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A REPORT TO THE BLYTH-ZELLERBACH COMMITTEE

ON MODERN MANAGEMENT FOR SAN FRANCISCO

Recreation and
Park Department

JUNE 1961

VOLUME 3

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RECREATION AND PARK DEPARTMENT

Report of the
Task Force

June 1961

A REPORT
WITH RECOMMENDATIONS
CONCERNING THE ACTIVITIES
OF THE
RECREATION AND PARK DEPARTMENT
OF THE CITY AND COUNTY
OF SAN FRANCISCO

BY THE
RECREATION AND PARK
TASK FORCE OF THE MAYOR'S
COMMITTEE FOR MUNICIPAL MANAGEMENT

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May 1961

Marshall O. Mustain,
Project Director
Mayor's Committee for Municipal Management
San Francisco, California:

Dear Mr. Mustain:

The Recreation and Park Task Force has completed a six-month study of the organization, policies, manpower, and methods of the Recreation and Park Department of the City and County of San Francisco. The attached report contains our findings and recommendations for improvement.

The following techniques of data gathering were used in the course of the study:

1. Interviews were held with management, key supervisory, and as many non-supervisory personnel as necessary to develop knowledge of the Recreation and Park Department organization and operation.

2. Meetings of the Recreation and Park Commission held during the course of field work were attended and minutes of the Commission for an eighteen-month period were read and analyzed.

3. Properties and facilities assigned to the Department were visited, inspected, and data gathered regarding physical facilities available, programs offered, and personnel assigned to the location.

4. Data were requested from other cities in San Francisco's population class.

5. Literature research included examination of budgets for recreation and park activities of other cities, annual reports of other recreation and park departments, master plans for recreation and park facilities published by other cities, and publications of the National Recreation Association and the California Recreation Commission.

The analysis of these data and discussions of the Task Force are reflected in the attached report.

We would like to take this opportunity to express our appreciation to the members of the Recreation and Park Commission, the management and staff personnel of the Recreation and Park Department, and members of other City and County departments for the excellent cooperation received in making available to us whatever sources of information were required and the time devoted to members of the Task Force during the course of the study.

Robert F. Hoffman
Chairman

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SUMMARY
AND
MAJOR RECOMMENDATIONS

SUMMARY AND MAJOR RECOMMENDATIONS

Summary

The Recreation and Park Department is responsible for: (1) planning for land and facilities necessary for park and recreational purposes, (2) acquisition of land and construction, reconstruction, operation and maintenance of facilities, (3) planning and supervising organized recreational activities on the Department's properties, and (4) negotiation of and administration of agreements with lessees and concessionaires operating on the Department's properties.

The total estimated expenditures for the Recreation and Park Department for the fiscal year 1960-61 is $9,[illegible]39,000, including requests for supplemental appropriations. Of this amount, $7,[illegible]26,000 is for operating purposes and the balance of $2,1[illegible],000 is for major facilities repair projects and capital additions.

The Department employs 836 full-time, 333 part-time, and 41 exempt employees. It owns or controls properties at approximately 1[illegible] locations, including Sharp Park Golf Course in San Mateo County and [illegible] Mather in Tuolumne County.

Major Recommendations

1. Appraise use and need of present land and facilities, whether developed or undeveloped, and declare unnecessary parcels surplus for possible return to the tax rolls. Eight properties are covered in detailed recommendations. A complete and detailed review would undoubtedly reveal others which might be considered unnecessary to current or anticipated needs of the Department.

2. Discontinue the practice of purchasing land from General Fund appropriations after voters have defeated a bond issue for the same purpose.

3. Establish a long-range planning program for new installations and facilities, including a review of the master plan approved in 1956, and distinguish between those essential and those merely desirable.

4. Discontinue capital expenditures for facilities and equipment which will be used only by special hobby groups or which appeal to only small segments of the population.

5. Establish a joint committee with the School District to coordinate planning of proposed, and use of present, facilities of both organizations in order to avoid duplication and insure maximum use of recreation areas.

6. Periodically review organized and supervised programs and eliminate high-cost, limited-attendance programs unless they can be made self-supporting.

7. Revamp supervisory responsibilities to achieve better supervision and coordination of effort and eliminate unnecessary positions.

8. Reschedule present morning programs to afternoon hours thus reducing the number of hours of supervision necessary by 22,946 hours annually.

9. Establish work performance standards for all field classifications and declare excess positions resulting therefrom cancelled as present personnel retire or leave the Department. Experience in the industrial field indicates this should result in a man-power savings of at least 15%.

10. Establish a realistic schedule of fees for activities which should be self-supporting, or nearly so, and adopt as a policy that adult programs should generally be self-supporting.

Savings

The recommendations contained in this report not requiring charter revision for adoption or implementation would have the following monetary effect:

Annual savings from present operations	$ 610,000
Elimination of future operating costs	290,500
One-time realization of value from sale of unnecessary property and prevention of capital improvement expenditures.	15,353,000
Annual ad valorem taxes from land returned to the tax rolls and new or additional fees and admissions.	2,178,000
Grand Total	$ 18,431,500

Charter Amendment Recommendations

1. Amend Section 42 to eliminate exclusive supervision and direction of recreational activities after school hours by the San Francisco Unified School District on facilities under its supervision

[illegible] Section [illegible] to eliminate the minimum, and establish a [illegible] amount, expressed as a number of cents in the tax rate, which may be devoted to Recreation and Park purposes.

Separate detailed reports supporting these recommendations, as well as others, are attached.

Recreation and Park Task Force

Robert E. Hoffman, Chairman
J. F. Brandeburg
S. G. Clark
W. J. Rafaelli
E. C. Tabler

I

GENERAL

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Land Holdings, Acquisition, and Capital Improvements

Findings

Land owned or controlled by the Recreation and Park Department was as follows:

	Acres		
	Inside(a) City Limits	Outside City Limits	Total
1947 (1)	3,210 (b)	655 (c)	3,865
1954 (2)	3,326 (b)	655 (c)	3,981
1960 (3)	3,426 (b)	655 (c)	4,081

(a) Exhibit X shows locations of properties as of June 30, 1960. Does not include estimated 52,372 acres of San Francisco Bay and Pacific Ocean areas within the city limits, some of which is used for recreation purposes and all of which provides open space.

(b) Includes 368 acres of Lake Merced water area. Does not include school playground areas used from time to time by Recreation and Park Department on a part-time basis, nor the 42 schoolyards presently staffed with School District personnel on a six-day, 22-hour schedule when school is in session and six-day, 40-hour schedule when school is not in session, nor 18 gymnasiums with School District coverage 15 hours (5 evenings) per week.

(c) Includes: Sharp Park Golf Course, San Mateo County 455 acres
Camp Mather, Tuolumne County 200 acres.

Land controlled by the Recreation and Park Department on June 30, 1960, represented 5.35 square miles or 11.5% of the available land area on the mainland of the City and County of San Francisco. This land provides .46 acres of recreation and park property per 100 population (1960 census). Guides used nationally for determining minimum adequacy of recreation and parks are: (a) 10% of available land area, or (b) 1 acre per 100 population. Master plans for recreation and park facilities in several cities were replete with the caution that there were no universally accepted standards for such facilities. The factors of geographic location of the city, density of population, nature of population, availability and cost of land, and availability of recreation and park facilities in the surrounding territory were among those to be considered in determining present and future adequacy of facilities.

Of eleven cities with from 500,000 to 1,[illegible] population in 1960, San Francisco ranks third in the percent of city area devoted to recreation and park facilities (Exhibit XI) and exceeds the average of 9.97% of the other ten cities. San Francisco's dense population places it below the weighted average of .633 acres per 100 population of the other ten cities.

(1), (2), (3) -- Numbered references are listed on sheet headed "References" at the end of narrative.

Other factors which must also be considered, and which are ignored in the above comparisons, are the availability of recreation and park facilities owned or operated by other governmental units in the vicinity of an urban city and also the availability of privately owned and operated facilities. Exhibits XII and IV show total recreation and park area and facilities available to residents of San Francisco in 10 counties within relatively short driving distances from the city.

Capital investment (4) in Recreation and Park Department facilities exclusive of Candlestick Park, was as follows:

	Total	Land	Buildings Structures Improvements	Equipment
Playgrounds	$16,344,907	$ 3,721,768	$11,851,406	$ 768,7[illegible]
Parks and Squares	32,139,991	21,388,140	10,787,680	964,1[illegible]
Golf Links	2,107,993	745,205	1,362,788	
Kezar Stadium	1,328,246	222,823	1,105,415	
Total	$51,921,137	$26,077,944	$25,110,289	$1,732,9[illegible]

Additions to properties (4) in Recreation and Park Department facilities, exclusive of Candlestick Park, for the ten-year period July 1, 1950 to June 30, 1960 were as follows:

	Total	Land	Buildings Structures Improvements	Equipment
Playgrounds	$10,307,619	$ 709,947	$ 9,076,227	$ 521,[illegible]
Parks and Squares	4,815,413	421,039	3,965,724	408,6[illegible]
Golf Links	1,177,407	745,205	423,202	
Kezar Stadium	286,943	167	286,776	
Total	$16,587,382	$ 1,876,358	$13,760,929	$ 950,[illegible]
Average Cost of Additions Per Yr.	$ 1,659,000	$ 188,000	$ 1,371,000	$ 95,[illegible]

Source of funds (4) for these additions to properties were:

1947 and 1955 Recreation Bonds	$12,579,271	75.8%
Current Funds	3,297,565	19.9%
State Funds	575,000	3.5%
Gift	116,750	.7%
Undetermined	18,796	.1%
Total	$16,587,382	100.0%

The additions to properties for the period July 1, 1950 to June 30, 1960 represents approximately 32% of total investment in properties as of June 30, 1960. Thus nearly one-third of the capital investment in properties and facilities was made in the last decade -- a decade in which San Francisco's population decreased 35,000 or 4.5%.

"Report on a Plan for the Location of Parks and Recreation Areas in San Francisco"

This report, prepared by the San Francisco Department of City Planning, published in April, 1954, recommended the addition of approximately 550 acres of land to be added to the major city-wide park system and approximately 200 acres of land to be added to the recreation and park system in the community areas of the city. The report defines twelve community areas for purposes of planning. The total of 750 acres recommended would have increased land owned or controlled by the Recreation and Park Department within the city limits by approximately 22.5% (from 3,326 acres to 4,076 acres). Including Sharp Park Golf Course in San Mateo County (455 acres) and Camp Mather in Tuolumne County (200 acres), the total land owned or controlled by the Recreation and Park Department and devoted to recreation and park purposes would be 4,731 acres.

The 4,076 acres recommended within the city limits would equal approximately 6.35 square miles or 13.7% of the city's land area. Based on the 1960 population this would be approximately .55 acres per 100 population.

On Page 26 of the report the following statement is made, "San Francisco is comparatively rich in large park lands, but is deficient in the number and distribution of its playgrounds and playfields, and small parks." However, the land proposed to be added for park purposes, in the main, were on the perimeter of the city or in the proposed interior green belt surrounding Twin Peaks and not in the type of facility in which the city is deficient. The proposed additions for community areas for parks, playlots, playgrounds, and playfields would have increased the proportion in such community areas from 25.6% to 25.8% of total Recreation and Park Department controlled lands.

In addition, on pages 15-17 of the report there is a discussion of the recreation programs and use of facilities of the School District and the Recreation and Park Department. The discussion ended as follows:

> "Instead of following the concept of school-playground neighborhood centers, which is gaining acceptance throughout the nation for reasons of economy and efficiency, the present charter provision (Section 42, fourth paragraph, amended 1949) is fostering a concept of division. It is here contended that this is undesirable from the standpoint of general planning principles, as well as the principle specifically stated as follows in the Land Use Section of the Master Plan: 'Within each residential community area the public and semi-public facilities, such as high school, junior high school, and playfields, should be grouped wherever possible into community centers easily accessible to all residents of the area.'
>
> "In any plan for recreation areas consideration of school properties must be included. It is not within the scope of this report, however, to present a solution for the jurisdictional difficulties of the present dual authority. Nevertheless, it is recommended that the situation be re-examined and that provision be made at least to formalize and strengthen the coordination which now exists on a voluntary basis between the two public agencies providing recreational services in San Francisco."
>
> NOTE: Parenthetical reference to Charter Section 42 added.

There is no evidence that the caution of the City Planning Department was heeded nor that their recommendation was acted upon. In fact, while the School District uses 45 locations on Recreation and Park properties, they also have 42 schoolyards with School District personnel supervision six days per week for 22 hours while school is in session and six days per week for 40 hours while school is not in session and 18 gymnasiums with School District personnel supervision five evenings per week for 15 hours.

Capital Improvement Program

The "Capital Improvement Program, 1960-1961 through 1965-1966" transmitted to Mayor Christopher on January 11, 1960, lists 126 projects for the Recreation and Park Department which are proposed for after June 30, 1960. The total estimated amount for these projects was $11,747,800 or an average of approximately $1,958,000 per year for the six-year period. The projected source of funds was as follows:

Annual Budget	$ 4,042,100
1947 and 1955 Recreation Bonds	2,844,400
Proposed New Bond Issues	2,970,000
Prior Years' Budgets	11,300
Other Sources	1,880,000

Major proposed projects are:

Ferry Park Land and Development	$ 2,970,000
Mc Laren Park Development	2,230,000
Marina Small Boat Harbor	1,825,000
Diamond Heights (2 playgrounds)	600,000
Hamilton Playground Development	350,000
Harding Park Golf Course, Automatic Irrigation System	300,000
Alta Plaza Play Area Redevelopment	300,000
Golden Gate Park - New Playground	202,500
New Playground at Melrose, Mangels & Terecita	200,000
San Francisco Zoological Gardens: (a)	
New Service Yard and Building	185,000
New Aviary for non-aquatic birds	180,000
Relocate Service Area	115,000
New Playground in Presidio, Marina District	175,000
Helen Wills Playground Rehabilitation	105,000
Holly Park Development Activities Area	100,000
Sigmund Stern Grove Golf Driving Range & Picnic Area	100,000
Total Major Projects	$ 9,937,500

(a) Total long-range capital investment program for San Francisco Zoological Gardens total $3,900,000.

These sixteen major projects represent approximately 85% of the six-year total proposed capital improvement program for the Recreation and Park Department. The Capital Improvement Program does not list such projects as the rehabilitation of the Palace of Fine Arts or the possible purchase of Fort Funston lands.

Capital and Annual Costs Per Acre

In summary, historical capital cost per acre is $15,613, which includes $8,687 for land (based upon additions for the last 10 years) and $6,926 for structures and improvements.

Annual costs per acre total $5,584 which includes $1,100 for maintenance of land and structures and $4,484 loss of property tax income. For the city's 3,426 acres, this amounts to more than 16½ million dollars annually.

Specific Recommendations

1. Review immediately land and facilities "owned" or controlled by the Recreation and Park Department which are undeveloped or inoperative for possible classification as surplus property. This review should include consideration of the following factors:

a. Purpose for which land is held and the objectives for which it was or might be developed.
b. Capital invested in land or improvements.
c. Current annual operating and maintenance costs, if any.
d. Estimated capital costs for proposed development to meet purposes and objectives of the facility.
e. Estimated sale price if property were to be declared surplus and sold.
f. Estimated annual operating and maintenance cost if facility were developed in accordance with plans.
g. Estimated ad valorem tax income if property were sold and developed and added to the tax rolls.
h. Examples:

(1) McLaren Park: Under acquisition since 1928. Total area is 326 acres with land value of $4,672,000 and improvements valued at $25,000 according to the June 30, 1960 property list. These figures do not reflect $406,400 invested in the swimming pool completed October, 1958 nor $580,000 invested in a nine-hole golf course to be completed in 1961. The presently undeveloped area in McLaren Park comprises 255 acres and represents approximately $3,600,000 in land value. As indicated in the previous discussion on the "Capital Improvement Program", it is planned to spend $2,230,000 for development of McLaren Park and it is estimated that annual buildings and grounds maintenance costs will be $280,500. Based on average property tax income per acre, the undeveloped portion of McLaren Park represents a minimum annual loss of $1,143,420 for ad valorem taxes.

(2) Bay View Park: Acquired 1915. Land area is approximately 26 acres with a land valuation of $130,000. This land, composed of red rock, would be difficult, and expensive, to develop and maintain. No plans to develop this park are included in the Capital Improvement Program.

(3) Sunset Heights Park: Acquired 1924. LAnd area is approximately 5 acres and has a valuation of $125,000. The eastern side of the park is flat and has a lawn area, play apparatus, and tennis courts. The balance is hilly with an imposing view of the Pacific Ocean.

(4) Durant and Richmond Tennis Courts: This land is owned by the School District and each parcel is .61 acres and the total valuation for the two is $280,000.

(5) Other undeveloped areas include Lake Merced lands (157 acres), Mt. Davidson Park (39 acres), Twin Peaks Park and Interior Green Belt (28 acres), Grandview Park (1 acre) and other miscellaneous properties totaling .9 acre.

It is recognized that some natural areas in the city's park system may be desirable but provision for these must be balanced with total recreation and park facility needs and other requirements of the city, including minimizing land exempt for property taxes unless a real public need is demonstrated.

2. Review immediately and revise the "Report on a Plan for the Location of Parks and Recreation Areas in San Francisco" giving due consideration to:

a. Decrease in population in San Francisco between 1950 and 1960 and the shift in location of the population during this same period.
b. Recreation and park facilities within and near San Francisco owned by other governmental agencies.
c. Plans for recreation and park facilities in and near San Francisco prepared by other governmental agencies.
d. Imbalance between neighborhood and community playground and playfield acreage vs. large park acreage.
e. Realistic evaluation of population served at existing locations.
f. Recreation facilities planned by the School District on projects proposed or under construction.
g. Recreation and park facilities in or near San Francisco which are privately owned and extensively used by San Francisco residents.
Examples: Russian River area, Valley of the Moon, Blackberry Farm near Cupertino, etc.
h. Examples:

(1) The California State Park Department in a recent annual report outlined plans to add portions of the Presidio, Fort Baker, Fort Barry, and Fort Cronkhite to the State Park System. These lands were to be acquired as they are declared surplus by the Federal Government.

(2) 1954 Plan Project 8.4: Proposed playlot on Caroline Street between 23rd and 25th Streets. This location is across the street from the Starr King Elementary School and there is some play apparatus already at this location.

(3) 1954 Plan Project 8.1: Bernal Heights Park and Playground, completely encircled by Bernal Heights Boulevard. This land is "owned" by the Department of Public Works and is approximately 20 acres. The June 30, 1960, valuation on the land was $100,000. The area involved is a red rock hill and leaves much to be desired as far as accessibility is concerned. Since it is on a hill, there is a question whether a playground at this location would be adequately patronized. In addition, development costs would be higher than normal.

(4) 1954 Plan Project 8.7: South Bernal Playground, Tompkins Avenue and Folsom Street. This location is a short distance from existing Bernal Playground and is related to Paul Revere School, which currently has a School District supervised program.

(5) 1954 Plan Project 9.1: Hunters Point Park-Playground, south of Northridge Road, adjacent to the Ridgepoint School then under construction. At the present time, the Housing Authority has constructed a recreation center at 1 Kiska Road and there is a School District supervised program at Jedediah Smith Elementary School.

(6) Playground on McLaren Park (added to 1954 Plan when approved in 1956): This proposed playground location seems to be on top of a hill, which detracts from patronage. Suggest using playground at Eldorado Home School.

(7) Playground in vicinity of Silver Avenue, Cambridge Street, and Vale Street (added to 1954 Plan when approved in 1956): This location is near Millcreek Elementary School which has a School District supervised program, both in the schoolyard, and at night in the gymnasium.

(8) 1954 Plan Project 10.2: Avalon Playground. This proposed playground is in the vicinity of Monroe Elementary School at Madrid Street and Excelsior Avenue.

(9) 1954 Plan Project 11.5: San Miguel Park and Playlot, interior of block bounded by Bruce Avenue, Edgar Place, Niagara Avenue, Howth Street and Geneva Avenue. This property is owned by the Seventh Day Adventist Church and is being developed for their own purposes.

(10) 1954 Plan Project 11.6: Merced Playground, South Side of Eucalyptus Drive between 25th Avenue and Inverness. This location is site of the new Lowell High School, presently under construction.

NOTE: The Recreation and Park Task Force of the Mayor's Committee for Municipal Management made no attempt to visit each proposed facility listed in the 1954 Plan. The above examples are illustrative only.

3. Declare as surplus the recreation and park properties which have been developed but which have little patronage, are DIFFICULT to maintain, and are near other facilities.

Examples:

a. James Rolph, Jr. Playground: Disposition recommended in 1954 Plan since its location at intersection of Army Street, Potrero Avenue and Bayshore Freeway cuts it off from residential areas it might serve. The land valuation on June 30, 1960 was $305,000.

b. Bay View Playground: Disposition recommended in 1954 Plan since its service area had developed into industrial area. The land valuation on June 30, 1960 was $250,000.

c. Alta Plaza: Area on Clay Street between Steiner and Scott Streets to a depth of 120' to 150'. This area is steeply terraced, is difficult to maintain, and is little used. Even with this 2.4 acres removed from the Alta Plaza there would remain approximately 9.5 acres for recreation and park purposes. The land valuation as of June 30, 1960 for the 2.4 acres is estimated at $620,000.

d. Lafayette Park: Area on Gough Street between Sacramento and Washington Streets to a depth of 130' except for extensive private property. This represents 1.34 acres of the approx. 11.56 acres in Lafayette Park. The eastern slopes of Lafayette Park are steep and grassed or planted in trees and shrubs requiring little attention. The land valuation represented by the portion under discussion as of June 30, 1960 was approximately $406,000.

NOTE Again, no attempt was made to review all existing properties, but the examples listed are illustrative of the principle involved.

4. Discontinue the practice of purchasing land for recreation and park purposes from general fund appropriations after proposed bond issues for such purposes have not been approved by the voters. Example: McLaren Park.

e. McLaren Park: On December 6, 1926 a $2,000,000 bond proposal to purchase and develop 550 acres of land and to equip this proposed park. This bond proposal was defeated. The city began buying the land from general funds. Over the years the area has been reduced to 326 acres and the final land acquisition was accomplished the latter part of 1960. Thus, land acquisition has taken 32 years. Land acquisition costs to date have been $1,532,320. Capital improvement costs to date have been $986,000 (for a swimming pool and a nine-hole golf course). A plan proposed in 1950 by contract engineers and landscape architects proposed a $6,500,000 development of McLaren Park, not including the golf course presently under construction. $2,230,000 is included in the capital improvement program for expenditure through June 30, 1966. Total cost of McLaren Park acquisition and development is currently estimated to be in excess of $9,000,000.

5. Discontinue capital expenditures for facilities and equipment which will be used only by special hobby groups or appeal to small segments of the population. Examples: Photography Center and some facilities at the Junior Museum.

6. Establish a committee to coordinate the planning of proposed Recreation and Park Department playgrounds and playfields with proposed School District playgrounds and playfields, or changes in such facilities so that duplication of facilities, and resulting high capital costs, may be avoided. The recommended membership of this committee is:

a. One representative of the Chief Administrative Officer's office or Department of Public Works.

b. One representative from City Planning Department.

c. One representative from budget unit in the Mayor's office (or Budget Department when established).

d. One representative from Recreation and Park Department.

e. One representative from the Board of Education or School District.

References

1. "Report on a Study of the Proposed Consolidation of the Park and Recreation Departments" - Office of the Mayor, City and County of San Francisco - August 1947.

2. "Report on a Plan for the Location of Parks and Recreation Areas in San Francisco" - San Francisco Department of City Planning - April 1954.

3. "Valuation of Real Property Owned by City and County of San Francisco" - Director of Property - July 1, 1960.

4. "Annual Report of the Controller of the City and County of San Francisco for the Fiscal Year Ended June 30, 1960."

RECREATION AND PARK - SCHOOL SYSTEM COOPERATION IN RECREATION PROGRAMMING

General

This discussion is based on the premise that the Recreation and Park Department should provide and supervise the organized recreational activities of the community and the Unified School District should be charged with providing the educational facilities and programs for the community. For the best utilization of the tax dollar, cooperation between those responsible for the recreation system and those responsible for the school system is essential. Existing state laws provide the means whereby any community can cooperate with another legal jurisdiction to finance, construct, maintain and program facilities and activities. San Francisco, under the present dual authority over recreation programs, is not taking advantage of these provisions. The division of responsibility for recreation programs within the area of the City and County of San Francisco encourages duplication of recreation facilities and programs. Building and maintaining separate facilities and providing separate personnel when, for the most part, use is heaviest at different times of the day, is a waste of the taxpayer's money.

"Report on a Plan for the Location of Parks and Recreation Areas"

The jurisdictional difficulties of the dual responsibility for recreational activities in San Francisco was recognized in the "Report on a Plan for the Location of Parks and Recreation Areas" prepared in April 1954 by the Department of City Planning. The report reviewed the consolidation of the Recreation Department and the Park Department, which was stimulated by duplication of service and a nationwide trend toward simplifying governmental structure and administration. Efficiency of operation and economy of effort were principal arguments in favor of the merger, which was consummated on July 1, 1950.

The report continued by emphasizing the following:

"Although the consolidation was promoted to achieve an economy in effort and to eliminate the duplication of services, the Charter amendment (see Section 42) established a new form of duplication and overlapping between the new department and the School District. The amendment states that it shall be the policy of the Recreation and Park Commission to promote and foster a program providing for organized public recreation of the highest standard. But it also provides that the San Francisco Unified School District shall supervise and direct recreational activities in facilities under its jurisdiction, a function previously carried out by the Recreation Department by agreement with the School District.

"During the 1952-53 fiscal year, the third year of the new School District recreation program, it operated on an all-year basis on 26 schoolyard sites as playgrounds and at 16 gymnasiums as night recreation centers. The activity programs on the schoolyards are planned for all school-age groups, but particular emphasis is placed upon the activities for children within the age range of the school at which the program is being conducted. The evening gymnasiums provide recreational activities for adults as well as boys and girls.

Because of the increase in the number of schoolyard teams in city-wide athletic leagues and play days, the School District has discontinued participation in the Recreation and Park Department sports program and has formed the Schoolyard Athletic League. Chess, badminton, the handicrafts have been added to the activities program. During the summer vacation last year (1953) approximately 6,500 children were taken on weekly outings and 335 children, under School District supervision, spent a week at the Silver Tree Day Camp operated by the Recreation and Park Department in Glen Canyon.

"The Charter mandate that the San Francisco Unified School District supervise and direct recreational activities in facilities under its jurisdiction has in part nullified the primary purpose of the consolidation amendment, which was to create a single department in the city charged with the responsibility for public recreation. However, this clause and the Charter provision that the newly created Commission and the School District shall have the power to supervise and direct other adjacent recreational and park facilities either jointly or severally by agreement, reflects the traditionally close alliance between the public recreation function and public education. Just as park and recreation properties become similar in visible aspect, so from the beginning of the public recreation movement there developed a less and less sharp distinction between the educational aspects of the Recreation Department and the recreational activities of the School District.

"Because of the similarity of purpose there was close cooperation between the Recreation Department and the School District before the 1950 charter changes. The usefulness and economy of placing recreation grounds next to schools, so well demonstrated at Aptos Playground and Junior High School, where the school use the ball fields during school hours, and the Recreation Department conducted programs in the school gymnasium after school hours and in the evenings, guided the choice of particular sites in the recreation bond issue development program. Many of the new post-war schools have been built with gymnasiums or all-purpose rooms to supplement the recreation facilities in nearby playgrounds. Ulloa School and South Sunset Playground, the new Grant School and Gilman Playground, and the schools and recreation facilities of the Sunset Community Center are examples of this juxtaposition. In neighborhoods where no playgrounds exist and none have been planned, the new 1948 bond issue schools such as Anza and Hillcrest are equipped with indoor and outdoor play space to supply the neighborhood need. Although the Recreation and Park Department of the City and the Recreation Division of the School District work closely together to insure a proper spread of service throughout the city, the present Charter provision forces a situation where two similar recreation programs, planned and supervised by different authorities, operate side by side.

The importance of this newly created duality of function and purpose to the plan for parks and recreation areas is that the 1945 Playgrounds Plan of the Master Plan and the 1947 Recreation Land Issue program were based on the principle that recreation areas should be located adjacent to schools so that maximum use of the facilities of each department could be obtained by joint use, at an overall saving to the taxpayer. Thus, the School District could use Recreation Department grounds during the school hours, and the Recreation Department could conduct community-wide activity programs in school gymnasiums and all-purpose rooms after school hours.

"It was formerly considered desirable by both departments to plan school and recreation facilities in conjunction with each other; the present division of authority encourages a separation of facilities so that each department can conduct a full neighborhood recreation program under its own policy.

"Instead of following the concept of school-playground neighborhood centers, which is gaining acceptance throughout the nation for reasons of economy and efficiency, the present charter provision is fostering a concept of division. It is here contended that this is undesirable from the standpoint of general planning principles, as well as the principle specifically stated as follows in the Land Use Section of the Master Plan: 'Within each residential community area the public and semi-public facilities, such as high school, junior high school, and playfield, should be grouped wherever possible into community centers easily accessible to all residents of the area.'

"In any plan for recreation areas consideration of school properties must be included. It is not within the scope of this report, however, to present a solution for the jurisdictional difficulties of the present dual authority. Nevertheless, it is recommended that the situation be re-examined and that provision be made at least to formalize and strengthen the coordination which now exists on a voluntary basis between the two public agencies providing recreational services in San Francisco."

The Current Situation

The present status of the services rendered by the Recreation Division of the Recreation and Park Department and the San Francisco Unified School District is as follows:

Recreation and Park Department:

1. Supervises and provides program and personnel coverage either full-time or part-time for some 50 recreation units with 12 gymnasiums plus the Junior Museum, Recreation Area Building, Aquatic Park, Lake Merced (Lake and Sports Center), four golf courses, Storyland, Golden Gate Tennis Courts, rifle range, and Summer Day Camps (Silver Tree and Pine Lake), nine swimming pools and Phelan Beach for a total of [illegible] locations. These locations include playgrounds, playfields, playlots and housing centers.

2. The administrative staff consists of an Assistant Superintendent of Recreation, two Supervisors of Athletics, five Supervising Directors, and three Recreation Directors.

3. The recreational units are supervised and serviced by:

   1 Supervisor of Aquatics
   1 Supervisor of Music
   1 Curator of the Junior Museum
   1 Supervisor of Drama and Dance
   7 Supervising Directors
   140 Full-time employees
   229 Part-time employees
   41 Exempt employees (not to exceed $124.99 per week)

School System Recreation Division:

1. Supervises and provides programs and personnel coverage on a part-time basis at 42 schoolyard playgrounds and 10 gymnasiums (five Elementary Schools, nine Junior High, and four Senior High Schools) at night. See Exhibit 1 for location of these units and their relationship to Recreation and Park Department locations.

2. The administrative staff consists of a Coordinator of Health, Physical Education, Athletics and Recreation (1/3 assigned to Recreation), and two Supervising Directors.

3. The schoolyard playgrounds and night gymnasium programs are serviced by:

   44 Schoolyard Directors with schedules of: 3:00 p.m. to 6:00 p.m. Monday through Friday, 10:00 a.m. to 5:00 p.m. Saturdays and school holidays, 40-hour (6 day) week during Easter, Christmas, and summer vacations.

   40 Exempt Civil Service Recreation Directors; 38 are evening gymnasium Directors scheduled 7:00 p.m. to 10:00 p.m. Monday through Friday. Two (2) Directors are assigned to each gym and alternate two nights one week and three nights the following week, as under the limitations of Civil Service "Exempt" regulations a Director cannot work the full week night schedule.

   8 Locker Aides scheduled 7:00 to 10:00 p.m. Monday through Friday through the year.

4. Authorized expenditures of this activity were as follows:

Fiscal Year Ended	
June 30, 1959	$203,538
June 30, 1960	207,471

There are 18 schools immediately adjacent to or across the street from recreation units (Exhibit V). Nine of these have gymnasiums. The school system provides evening programs in five.

Thirty-three recreation units or facilities and eight swimming pools are used by schools during school hours for gymnasium classes, R.O.T.C. training, play and lunch periods (Exhibit VI).

Thirty-three recreation facilities, plus swim pools are used by schools for "after school sport activities" (Exhibit VII) and for Academic Athletic Association competition.

Although there has been cooperation between the two organizations, only two school gymnasiums have been used recently by the Industrial Division of Recreation and Park Department. They are used for adult men's basketball league and women's volleyball league competition. However, the school system recreation department supervises the gymnasiums during these programs.

The cooperation and coordinated use of facilities appears to be one sided. The Recreation Division of Recreation and Park Department provides the school system with unlimited use of their facilities; the school system's facilities are generally available for only the school's recreation programs. This does not allow the Recreation and Park Department to conduct community-wide activities and programs in school gymnasiums and all-purpose rooms after school hours. It defeats the principle that maximum use of the recreation areas and facilities of each department could be obtained by joint use, at an overall saving to the taxpayer.

Following is a list of cities where contract agreements have been arranged between Recreation and/or Park Departments and the School Districts authorizing use of certain defined school areas, buildings or facilities by the City Recreation Department:

New York	West Covina	Fremont
Chicago	Santa Rosa	Newark
San Diego	Glendale	Antioch
Beverley Hills	Daly City	Ukiah

Specific Recommendations

1. Develop a plan for the cooperative use of facilities owned by San Francisco Unified School District and the Recreation and Park Department. The Recreation and Park Department should supervise "organized recreation" after school hours with cooperation from the school district. Formalize this plan in the form of an agreement between the San Francisco Unified School District and the City and County of San Francisco.

This agreement should provide for:

a. Specifying the location for and nature of cooperative programs.

b. Selection of personnel to supervise such cooperative programs.

c. Equipping and maintaining facilities cooperatively used.

2. Establish a committee to coordinate the planning of proposed Recreation and Park Department facilities with proposed School District facilities, or changes in such facilities, so that duplication, with resulting higher capital costs, may be avoided. The term "facilities" includes playgrounds, playfields, playlots, gymnasiums, auditoriums, recreation center buildings, multi-purpose rooms, swimming pools, etc. The recommended membership of this committee is:

a. One representative from the Chief Administrative Officer's office or the Department of Public Works.

b. One representative from the City Planning Department.

c. One representative from the budget unit in the Mayor's Office (or Budget Department, when established).

d. One representative from the Recreation and Park Department.

e. One representative from the Board of Education or the School District.

Note: This same recommendation is included under the subject of "Land Holdings, Acquisition and Capital Improvements."

3. Undertake an immediate and thorough study to determine possible utilization of School District facilities and programs which might fulfill proposals contained in approved master plan for recreation and park locations.

4. Consider the appointment of a representative of the Board of Education or School District to the next vacancy on the Recreation and Park Commission. Many communities in the state have found this advantageous for developing understanding, coordination and cooperation between two governmental units with overlapping responsibilities.

Charter Amendment

5. Amend Section 42 of the Charter to eliminate exclusive supervision and direction of recreational activities after school hours by the San Francisco Unified School District in facilities under its supervision. As the School District is not accountable directly to the top management of the City and County (Mayor or Board of Supervisors), it should not control recreational activities.

The school district's responsibility is basically educational in nature. Recreation logically concerns the youngsters' free time after school hours are completed and adults during their free time, which generally occurs during evenings, week-ends, or days off from work.

RECREATION PROGRAMS

The Recreation and Park Department operates a great variety of activities, both outdoor and indoor. There is apparently no attempt made to differentiate between programs which are purely recreational and those of a quasi-educational nature. Also, programs are instituted without regard to the degree of acceptance by the population.

The general principles governing recreation programs should be:

1. Primary emphasis should be on mass appeal and free play.

2. Heavy capital investment should not be incurred unless the installation will qualify under #1 above.

3. Adult programs should be self-supporting and, as nearly as possible, self-administred.

4. Teenage and pre-school age programs having limited appeal (patronage) should be self-supported either by the parents or booster clubs, or discontinued.

5. Programs should be inaugurated, or continued, only when a spontaneous public desire has been demonstrated. The public should not be proselyted or pressured to participate.

6. Existing programs should be reviewed periodically, and those not having general acceptance should be promptly discontinued.

7. Programs evidencing lack of attendance at certain locations, due to changing population patterns, etc., should be discontinued at those locations.

The 1947 "Report on a study of the proposed consolidation of the Park and Recreation Departments" prepared by the budget staff of the Mayor's Office contains the following observations:

> Page 6, Par. 13 (in part): "Some of the facilities provided now or in the past have limited appeal and require comparatively heavy unit costs. The propriety of free use of such facilities which appeal to persons who otherwise spend considerable sums in pursuit of their hobbies may well be questioned.....In any case more stress should be laid on programs with mass appeal and less on those requiring expensive equipment that can be used by only a limited number of participants." (Underlining added.)

Page 32: "Free Play" versus Organized Programs. There is, in Francisco at least, an expressed disbelief in organized play - the opinion that it means forcing little Johnnie to play tiddlywinks when he would rather kick a football around. The facilities should be available for 'free play,' for uses expressing the individual wishes of the users. Hence the Park Department has kept playground supervision ..... down to the minimum .... In many of these matters the Recreation enthusiasts are motivated by other considerations. Their thinking is based primarily on the idea of organized programs of play, with character formation as an end product, as in the school - just as, in fact, their activities differ little from many which are provided for children during school hours and for adults in the evening."

The above observations have the same validity today as in 1947.

Attendance

No attempt is made to record the actual number of persons attending the Recreation programs. The records relate to "units of attendance." Thus, a child participating in several programs during the day may be counted as many as five times, once for each of three count times and once for each program. As an example, the report of the Drama and Dance Section includes in their figures attendance at the following Special Events as;

Carnival at Stern Grove	7,798
Photography Day	3,560
Joseph Lee Day	1,370

and the Music Section includes in their attendance report:

Carnival at Stern Grove	6,644
Photography Day	3,535
Joseph Lee Day	1,270

Obviously the same persons are included in total figures twice. The same situation exists with the regular programs. If figures were available they would certainly show that the cost of a number of the programs, when Recreation Director, Music and Drama, and Music Section costs were included, is very high per person participating. These high-cost organized programs with not too large participation, and which closely parallel the school curriculum, should be analyzed with the view of replacing them with other types of less expensive recreation.

An evaluation of the various programs should be based upon the actual number of persons attracted to the activity and not to the figures appearing in the Department's annual report, which, in nearly all cases, represent the sum of the persons present at three separate hours of each day. Thus, one person present at each count time every day would appear in the report of attendance as 1,095.

Specific Recommendations

1. Attendance records should be maintained to reflect the actual number of persons using the facilities for--

a. free play
b. each organized program--

and reports should be made on this basis.

2. Distinction should be made between purely recreational and educational or quasi-educational programs, and the latter should be left to the School Department. Many of the present programs in the Drama and Dance and Music Sections closely parallel the school curriculum and are conducted at high per-unit cost.

3. Discontinue all programs not conforming to the general principles enumerated above.

AUTOMOBILE USE

Twenty automobiles are assigned to individuals rather than to department "divisions." In some cases, however, other supervisors or employees of the department may use the vehicles, when they are not in use by the assigned person. This is particularly true in the Recreation Division, where the automobiles assigned to the Assistant Superintendent and the Supervisor of Athletics-Male are used by others for field visits or meetings during the day work-hours, evenings, or weekend assignments. In addition, a station wagon is assigned to the Engineering Division.

Division assignment of these automobiles is:

Division	Number of Autos	Mileage: Total Annual	Mileage: Annual Average Per Auto (1)
Engineers	3	21,586	7,285
Administration	4	43,625	10,906
Park	11	113,278	10,298
Recreation	3	22,572	7,524
Total	21	201,331	9,587 Avg.

(1) See Exhibit VIII for auto use detail.

The average number of miles used may not be an accurate picture of actual usage in the job operation, as most of these vehicles are parked or garaged at the assigned individual supervisor's or employee's residence during evening hours. These are used for personal transportation to and from their place of work or headquarters, and some are used for lunch period transportation.

Employee-owned automobiles are used as follows:

Division	Average No. of Autos	Annual Usage (estimate) (2): Mileage	Amount Due	Amount Paid
Administration	--	--	$ --	$ --
Engineers	4	14,196	1,426.00	922.00
Park	12	22,884	2,101.00	1,391.00
Recreation	19	92,760	8,363.00	5,497.00
Miscellaneous	2	3,108	310.00	189.00
Total	37	132,448	$12,210.00	$7,999.00

(2) Based on average of 3 months' usage in 1960. See additional breakdown of above figures on Exhibit IX.

In most instances, Recreation supervisors use their personal automobiles when carrying evening assignments, such as meetings, dinners, recreation center activities, etc., and week-end supervisory responsibilities. A considerable amount of this type of work is done by these supervisors.

There is a definite question as to the practicality, reasonableness or economical use of several of the permanently assigned vehicles. Examples are:

Division	Title	Permanently Assigned Auto
Park	Four (4) Supervisors of Buildings and Grounds	4 - Ford 6, 4 Dr. Sedans
Park	Supervisor of Roads & Paths	Chev. 6, 4 Dr. Sedan
Park	General Foreman Carpenter	Ford 6, 4 Dr. Sedan
Park	Supervisor Golf Course-Maint.	Rambler-AmerCar, 4 Dr. Sedan
Engineers	Engineer	Rambler-AmerCar 6, 4 Dr. Sed.
Engineers	Supervising Engineer	Chev. 6, 4 Dr. Sedan
Admin.	Commissary	Rambler-AmerCar 6, 4 Dr. Sed.
Admin.	Business Manager	Stude. 8, 4 Dr. Sedan
Recreation	Asst. Supt. of Recreation	Rambler 6, 4 Dr. Sedan
Recreation	Supervisor of Athletics	Chev. 6, 4 Dr. Sedan

Specific Recommendations

1. Another type of vehicle, such as a pick-up truck, would be better able to cover "in the field" operations of the seven Park Division personnel. (First four items above.) The transportation of tools, hoses, materials, etc. would be accomplished more quickly and economically. The truck should be returned to the main yard at close of each day. The presently used sedans should be transferred to the pool when trucks have been provided.

2. A car pool should be established at the main yard. Of the total of 18 cars, exclusive of the Engineers Division, seven would be assigned full time to specific positions, and 11 would be in the pool. It is possible that experience will indicate that some reduction in the pool could be made. The seven permanent assignments should be:

General Manager
Superintendent of Grounds
Superintendent of Maintenance
Four District Supervising Directors.

3. All other personnel would obtain cars from the pool upon proper authorization. This would require forward planning of work by these persons and a "scheduled in advance" requisitioning of automobiles.

All automobiles, except the General Manager's and those authorized for evening or overnight business use, would be returned to the pool at close of business each day.

4. The car pool should be operated under the following system:

a. Limit allocation of automobiles to individual use and prohibit use of city-owned cars for personal purposes, such as to and from home, lunch, etc.

b. Management of the pool should be placed with the present personnel in Administration and Business Division.

c. Require pool cars to be returned to pool at end of each day, except when properly authorized for evening and week-end use.

d. Require advance scheduling of pool-car use to permit pool supervisor to efficiently allocate use and provide authorization and record forms for this purpose.

e. Reduce use of personal automobiles and require management approval for such use in city business. Provide authorization and use forms to record and control this use.

f. Provide full reimbursement for authorized use of personal automobiles.

g. Obtain verification that adequate insurance coverage is carried on use of personal automobiles.

5. Recording forms should be introduced to permit accurate recording of the use of each car and from which periodical reports could easily be compiled. Also institute requisition authorizing release of cars by main yard pool custodian and form on which he reports its return to pool supervisor.

NOTE: Pool supervisor and pool custodian duties can be handled by present personnel. No new positions required.

LIMITATION ON AMOUNT OF FUNDS ALLOCATED TO RECREATION AND PARK PURPOSES

During the last ten years the cost of Recreation and Park activities has steadily increased, and present indications are that the current high level will continue for some time. (Exhibit X)

Gross expenses (exclusive of bond service) have increased from $4,754,000 in 1951 to an estimated figure of $9,815,000 in fiscal 1961, and bond service has increased in the same period from $177,000 to $1,102,000. During this period revenue generated has increased but little, from $1,127,000 to $1,258,000. Thus, the cost of operations and capital requirements has increased 153.8% over the cost in 1951. (Exhibits XI and XII) The portion of the ad valorem tax rate required to cover these costs is 83.18 cents or 94.4% over the 1951 figure of 42.78 cents; the percentage of the ad valorem rate is 9.81% or 44.2% over the 1951 figure of 6.8%.

The Consumers Price index during these ten years has risen 25.6%, while the cost of government represented by the ad valorem tax rate has risen 34.8%; but the portion devoted to Recreation and Park purposes has risen 94.4%.

This rapid and continuing increase is made possible by the absence of any limiting provision in the charter as presently written. The charter prior to 1932 provided a maximum amount to be devoted to Recreation and Park purposes of 17¢ in the tax rate; 10¢ for Recreation and 7¢ for Parks. Upon adoption of the present charter in 1932, Section 78 was written to provide that these former maxima become the minima without making any provision for a ceiling on the amount to be devoted to these purposes.

Comparison of San Francisco Recreation and Park costs with those of other cities is not easily made owing to the many different concepts of accounting and responsibility. However, whatever method is used indicates that San Francisco is a very high cost city. The fact that San Francisco is a combined city and county government does not prevent comparison with other city governments, for there are contiguous to San Francisco many recreation areas which are available (Exhibits III and IV). Perhaps the best comparison is that provided by the Census Bureau, for while the Bureau figures include museums, auditoriums, etc. not included in the Recreation and Park budget and exclude capital expenditures, they nevertheless provide a uniform basis of comparison. The Census Bureau figures for 1959, the latest available figures, show San Francisco's per capita expense for park and recreation purposes to be exceeded only by Washington, D.C. in cities of comparable population. (Exhibits XIII, XIV, and XV)

As bond service costs for Recreation and Park purposes will remain at, or about at, present levels through 1969, (Exhibit XVI) San Francisco's Recreation and Park costs cannot be immediately reduced to levels comparable with other cities, but it is imperative that these costs should be limited by statute.

Specific Recommendations - Charter Change

1. Amend Section 78 of the Charter to eliminate the minimum and establish a maximum amount, expressed as a number of cents in the tax rate, which may be devoted to Recreation and Park purposes. To the funds so determined would be added the revenue generated. This total amount would then be applied first to bond interest and retirement requirements, and the remainder to operating expense and capital expenditures.

2. Also amend the Charter to provide that any funds so appropriated but not used in the current year shall be earmarked for use in future years for capital expansion.

3. The initial maximum should reflect the cost reductions recommended in this report.

4. Provision should be made to review the maximum limit periodically, particularly when the bond service requirements diminish, to determine the propriety of a downward revision of the maximum.

5. The figures in Exhibit X indicate that this maximum should be fixed initially at 64 cents per $100 assessed value of real property.

These recommendations will result in more efficient operation by making mandatory certain procedures which are the subject of other recommendations, viz:

1. Curtail or eliminate programs which have only limited appeal unless self-supporting, including cost of supervision and indirect costs.

2. Establish more realistic work norms and rearrange duties, eliminating excess positions and improving supervision.

3. Project future costs of contemplated new installations and programs to insure staying within statutory limit.

4. Provide mutual planning with School Department for future expansion to avoid the duplication of facilities, and

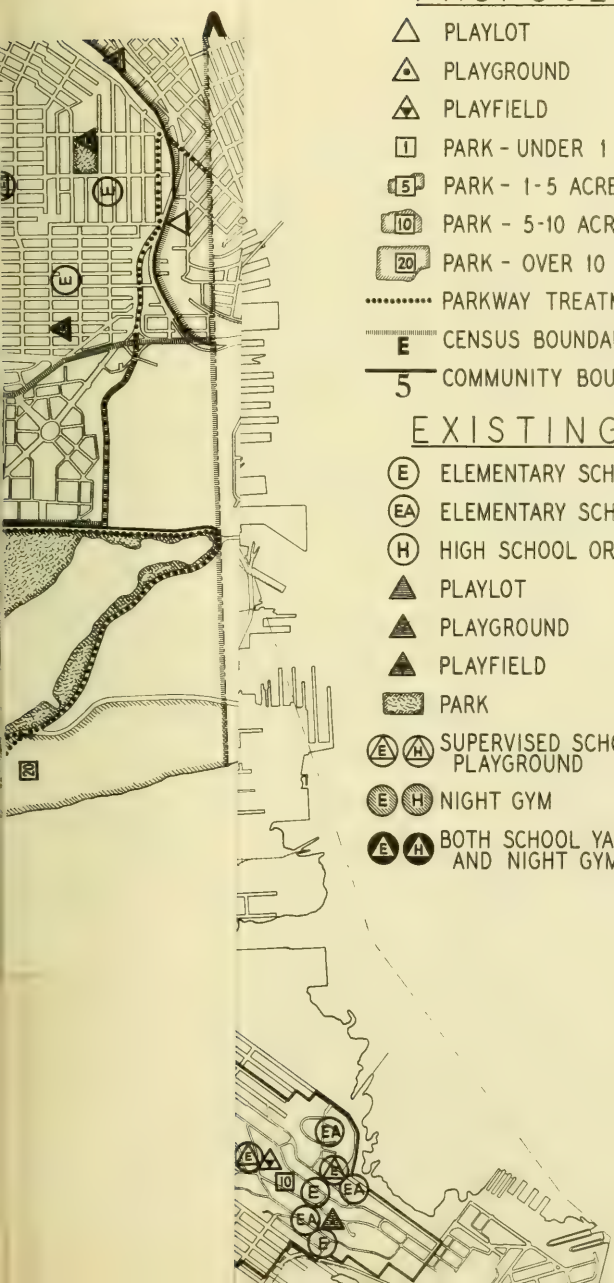
5. Obtain full cooperation with School Department for full time use of both school and recreation facilities under a single supervision after school hours. (This may require amending Section 42 of the Charter.)

6. Increase the income derived from operations by charging for certain activities now free, and charging more realistically for others.

RECREATION AND PARK

EXHIBIT I

RE



LEGEND

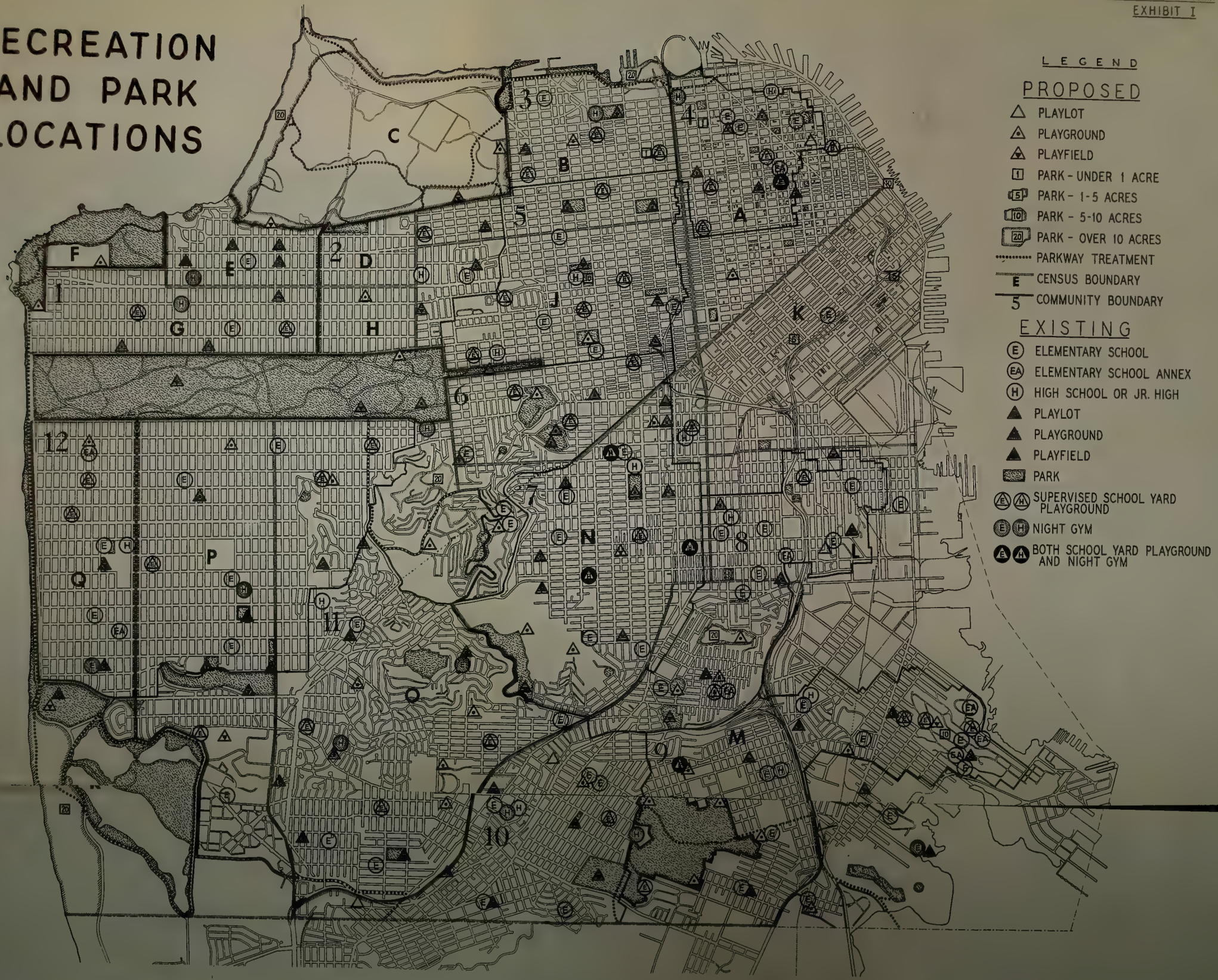
PROPOSED

- PLAYLOT
- PLAYGROUND
- PLAYFIELD
- PARK - UNDER 1 ACRE
- PARK - 1-5 ACRES
- PARK - 5-10 ACRES
- PARK - OVER 10 ACRES
- PARKWAY TREATMENT
- CENSUS BOUNDARY
- COMMUNITY BOUNDARY

EXISTING

- ELEMENTARY SCHOOL
- ELEMENTARY SCHOOL ANNEX
- HIGH SCHOOL OR JR. HIGH
- PLAYLOT
- PLAYGROUND
- PLAYFIELD
- PARK
- SUPERVISED SCHOOL YARD PLAYGROUND
- NIGHT GYM
- BOTH SCHOOL YARD PLAYGROUND AND NIGHT GYM

RECREATION AND PARK LOCATIONS



PER CENT OF CITY AREA IN RECREATION AND PARK FACILITIES

AND ACRES PER 100 POPULATION

CITIES WITH 500,000 -- 1,000,000 POPULATION[1]

AND UNDER 100 SQUARE MILES IN AREA

	Per Cent of City Area	Acres Per 100 Population
Washington, D. C.	16.5[2]	.96
Milwaukee, Wisconsin	15.0	1.19
San Francisco, California	11.5	.43
Buffalo, New York	11.0	.57
Baltimore, Maryland	10.9	.64
Boston, Massachusetts	10.2	.43
St. Louis, Missouri	8.2	.43
Cincinnati, Ohio	7.8	.68
Cleveland, Ohio	7.6	.42
Pittsburgh, Pennsylvania	6.5	.38
Seattle, Washington	5.5	.57

(1) - 1960 Census

(2) - Includes park facilities administered by National Park Service.

RECREATION LAND HOLDINGS IN ACRES
(Nine Bay Area Counties and Santa Cruz County)

	Parks & Recreation Areas		Hist. Monuments	Bot. & Nat. Areas	Wildlife Refuges & Ranges	Total
	Total	Developed				
Federal						
Marin County	485	3				485
San Francisco County					91	91
Napa County	19,250					19,250
Total Federal	19,735	3			91	19,826
State						
Alameda County				470		470
Contra Costa County	2,497	105				2,497
Marin County	4,877	111				4,877
San Francisco County	24					24
San Mateo County	4,001	100				4,001
Solano County	123		1		10,487	10,611
Santa Clara County	12,161					12,161
Napa County			396		72	468
Sonoma County	1,137	16	80	317		1,534
Santa Cruz	13,267	159	1			13,268
Total State	38,087	491	475	787	10,559	49,911
County						
Contra Costa County	1,431	8				1,431
Marin County	186	5				186
San Francisco County	4,133	3,633				4,133
San Mateo County	2,500	800				2,500
Santa Clara County	7,207	6,692				7,207
Napa County	1	1				1
Sonoma County	105	90				105
Total County	15,563	11,229				15,563
City						
Alameda County	2,742	2,218				2,742
Contra Costa County	633	556				633
Marin County	632	516				632
San Mateo County	1,104	1,000				1,104
Solano County	644	449				644
Santa Clara County	3,229	1,471				3,229
Napa County	812	811				812
Sonoma County	573	247				573
Santa Cruz County	656	230				656
Total City	11,025	7,498				11,025
Recreation District						
Alameda County	8,330	8,309				8,330
Contra Costa County	33	21				33
Marin County	8	6				8
San Mateo County	152	146				152
Solano County	26	26				26
Santa Clara County	3	3				3
Sonoma County	30	23				30
Santa Cruz County	6	6				6
Total Recreation District	8,588	8,540				8,588

[illegible]

[illegible]

([illegible] of [illegible] pages)

	Parks & Recreation Areas Total	Parks & Recreation Areas Developed	Hist. Monuments	Bot. & Nat. Areas	Wildlife Refuges & Ranges	Total
Unclassified						
Marin County	29					29
Total Unclassified	29					29
Grand Total	93,027	27,761	478	787	10,650	104,942
Total Acreages By Counties						
Alameda	11,072	10,527		470		11,542
Contra Costa	4,594	690				4,594
Marin	6,217	641				6,217
San Francisco	4,157	3,633			91	4,248
San Mateo	7,757	2,046				7,757
Solano	793	475	1		10,487	11,281
Santa Clara	22,600	8,166				22,600
Napa	20,063	812	396		72	20,531
Sonoma	1,845	376	80	317		2,242
Santa Cruz	13,929	395	1			13,930
	93,027	27,761	478	787	10,650	104,942

Source: "California Public Outdoor Recreation Plan - Part II" Published July, 1960, by California Public Outdoor Recreation Plan Committee.

SELECTED RECREATION FACILITIES - 1958

Facility	Total	County									
		Alameda	Contra Costa	Marin	S. F.	San Mateo	Solano	Santa Clara	Napa	Sonoma	Santa Cruz
Family Picnic Units	15,557	4,669	2,206	1,406	1,370	2,432	177	1,410	599	674	614
Group Picnic Grounds (Capacity - Persons)	65,370	29,135	3,210	960	10,700	8,030	1,300	4,220	3,625	2,200	1,990
Family Camp Units	722	14	55	105	--	162	--	--	--	51	335
Organized Camps	74	13	10	10	1	8	--	4	3	10	15
Swimming Beaches (Effective Feet*)	40,985	1,955	500	2,135	7,475	5,050	500	650	800	6,833	15,087
Swimming Pools	77	10	11	1	4	7	6	24	7	6	1
Boat Launching Units	197	29	44	29	14	9	26	16	12	11	7
Boat Mooring (Boats Accommodated)	8,757	1,590	3,903	1,625	379	485	288	372	65	--	50
Lakes	13	3	--	2	1	--	--	6	1	--	--
Outdoor Theatres	10	1	--	1	2	1	--	1	--	1	3
Stadiums	32	5	4	1	6	3	1	6	--	3	3
Tennis Centers	161	--	--	6	45	29	22	40	--	17	2
Golf Courses	67	11	7	4	8	8	4	12	2	7	4

* An effective foot of shoreline is the equivalent of an area of shoreline one foot wide by 665 feet long, comprised of 100□' of water surface suitable for swimming, 200□' of beach for sunbathing and play, 100□' of buffer zone, and 265□' for parking. (Each 1,000 persons in the population requires 25 effective feet of shoreline.)

Source: "California Public Outdoor Recreation Plan - Part II"
Published July, 1960 by California Public Outdoor Recreation Plan Committee

San Francisco Unified School District

Schools Adjacent to Recreation-Park Units

Schools	Recreation Units
A. P. Giannini Jr. High (G)	West Sunset
Mark Twain	West Sunset
Aptos Jr. High (Supervised evenings-G)	Aptos
Bret Harte (Supervised evenings-G)	Gilman
Burnett (Supervised schoolyard to supplement limited outdoor facilities at Joseph Lee)	Joseph Lee
Geary	Laurel Heights
Longfellow	Alice Chalmers
Marina Jr. High (Supervised evenings-G)	Funston
Miraloma (Supervised evenings-G)	Miraloma
Ulloa (Supervised evenings-G)	South Sunset
Visitacion Valley	Visitacion Valley
West Portal	West Portal

Not Adjacent but Across the Street

Benjamin Franklin Jr. High (G)	Hamilton
Douglas	Eureka Valley
Grattan	Grattan
Mission High (G)	Mission Park
Pelton Jr. High (G)	Silver Terrace
Starr King	Potrero Hill

(G) Gymnasium at school location.

RECREATION FACILITIES USED BY VARIOUS SCHOOLS DURING SCHOOL HOURS

Recreation Unit	School
ALTA PLAZA	Town School Gym M - F
APTOS	Aptos Jr. High Girls' and Boys' Gym Classes all year
BALBOA	S. F. City College Men's and Women's Gym Classes M - F
	Balboa ROTC Friday
BIG REC	Polytechnic Boys' Gym Classes M - F
LITTLE REC	Polytechnic Boys' Gym Classes M - F
CHINESE CENTER	Commodore Stockton Gym M-W-F
	J. Parker Gym T-Th
	St. Mary's T-Th
KEZAR PARKING AREA	Polytechnic ROTC as needed
GOLDEN GATE PARK PANHANDLE	Lowell Boys' Gym Classes M-F
DU PONT TENNIS COURTS	Presidio Jr. High Girls' and Boys' Tennis T-W
EUREKA VALLEY	Douglas School Boys' Gym Classes and lunch period M-F
	Most Holy Redeemer Gym Classes
FOLSOM	Hawthorne Gym M-F
	St. John's Lutheran Gym and lunch M-F
FUNSTON	Marina Jr. High Gym Classes
	Stuart Hall Gym Classes M - F
	Miss Burke's as needed
GRATTAN	Grattan School Gym Classes
HAMILTON	B. Franklin Gym Classes M - F
HAYWARD BOYS	Sacred Heart Gym Classes M - F
	St. Paul's School Gym and Lunch M - F
HAYWARD GIRLS	Cathedral School Lunch and Gym
	Laguna Nursery Lunch and Play Periods
	Golden Gate Nursery Lunch and Play Periods
JR. MUSEUM	Science Classes visit during School Hours
KAHN, J.	Wilkins' Private School uses it for their Gym Periods
LARSEN SQ.	St. Cecilia's Boys and Girls at Lunchtime
McCOPPIN	A. Lincoln Boys' Gym Classes
MISSION DOLORES PARK	Boys' and Girls' Gym Classes M - F
	ROTC M - F
NORTH BEACH	Francisco Jr. High Boys' and Girls' Gym Classes M - F

Recreation Unit	School
PARKSIDE SQ.	
PORTOLA	Kittredge Private School Boys' and Girls' Gym Classes M - F
ROCHAMBEAU	
ROLPH	St. Peter's Boys' Gym Classes Monday a.m.
ROSSI	Roosevelt Jr. High Boys' Gym Classes M - F
ST. MARY'S	St. John's High School Girls' Gym Classes Thurs. a.m.
SOUTH SUNSET	St. Gabriel's Grammar School Boys' Gym Classes M - F
	Ulloa School on occasion
SUNSET	Talmudical Seminary daily M - F
UPPER NOE	St. Paul's High School Girls' Gym Classes T-Th.
VISITACION VALLEY	Visitacion Valley School Gym Classes M - F
WEST SUNSET	Giannini Jr. High School Gym Classes M - F

Swimming Pools

Fleishhacker
Hamilton
Balboa
North Beach
Rossi
McLaren
Mission
Larsen

Legend:

M - Monday
T - Tuesday
W - Wednesday
Th - Thursday
F - Friday

San Francisco Unified School System

SCHOOLS USING RECREATION FACILITIES AFTER SCHOOL HOURS

Recreation Facility	School	Fall	Winter	Spring
ALTA PLAZA	Emerson Grant		All year	
	Pacific Heights Town School		All year	
APTOS	Aptos Jr. High practice	Baseball		Soccer
	Jr. High League	"		"
BALBOA	Balboa Practice		All year	
	Lick Wilmerding practice	Football		
	S. F. City College practice			Baseball
	Denman Jr. High practice	Baseball		
	Jr. High League	"		
	Sr. High League			Baseball
	S. F. City College League			"
BEACH CHALET	Lincoln High practice	Soccer		
	Washington "	"		
	Polytechnic "	"		
	Lowell "	"		
	AAA League Games	"		
	Presidio Jr. High			Soccer
	Jr. High League Games			"
BIG REC	Polytechnic practice			Baseball
	Lowell "			"
	St. Ignatius "			"
	AAA League			"
	Jr. College League			"
CABRILLO	St. Thomas	as needed		
	Lafayette School	" "		
CAYUGA	Denman P.T.A.	" "		
	Balboa P.T.A.	" "		
CHALMERS	Longfellow P.T.A.	" "		

EXHIBIT VII
(2 of four pages)

Recreation Facility	School	Fall	Winter	Spring
CHINESE PLAYGROUND	C. Stockton, J. Parker	as needed		
	Redding, W. Irving,	" "		
	Francisco, Marina,	" "		
	Sherman, Cooper,	" "		
	Spring Valley, and	" "		
	Church schools	" "		
CHINESE CENTER	Stockton, Parker,	" "		
	Redding, Irving,	" "		
	Francisco, Marina,	" "		
	Sherman, Cooper, Hancock,	" "		
	Spring Valley	" "		
COW HOLLOW	Scott, Grant, Yerba	" "		
	Buena, Burkes, Hamlin,	" "		
	Town School,	" "		
	St. Vincent, St. Lukes,	" "		
	Sacred Heart, and	" "		
	Kindergarten	" "		
CROCKER AMAZON	Balboa practice	Soccer		
	Mission "	"		
	Burbank "			Soccer
	Denman "			"
	Pelton "			"
	AAA League Games	"		
	Jr. High League Games			"
	Balboa J. V.			Baseball
	AAA J. V. League			"
DOUGLAS	J. Lick practice			Soccer
DUBOCE	McKinley, Dudley Stone	as needed		
	Everett	" "		
DU PONT COURTS	Washington practice			Tennis
	Presidio High "	Tennis		
FUNSTON	Galileo practice			Baseball
	Sacred Heart "			"
	AAA League Games			"
	Marina Jr. High practice	Baseball		
	Jr. High League	"		
	St. Brigids	as needed		
	St. Vincents	" "		
GLEN PARK	Mission J. V. practice			Baseball
	Jr. High League Games	Baseball		

EXHIBIT VII

(Page 3 of four pages)

Recreation Facility	School	Fall	Winter	Spring
GOLDEN GATE TENNIS	AAA Tournament			Tennis
	S. F. City College Matches			"
	U. S. F. Matches			"
	Lowell practice			"
	Poly "			"
	St. Ignatius practice			"
	Washington "			"
HAMILTON	B. Franklin practice	Tennis	Tennis	Tennis
JACKSON	Closed at present, but usually takes care of Mission, Horace Mann, and Everett for baseball and track.			
McCOPPIN	Lincoln practice			Baseball
	Lincoln J. V. practice			"
	Lincoln practice	Soccer		
MISSION DOLORES PARK	Mission J. V. practice	Football		
	Mission practice	Soccer		
NORTH BEACH	Francisco practice			Soccer
OCEAN VIEW	S. F. City College practice	Soccer		
	Jr. College League games	"		
	Jr. High League games			Soccer
	Balboa J. V. practice			Baseball
	J. V. League games			"
PORTOLA	Portola Jr. High pract.		Basketball	
	Jr. High League Games		"	
	Portola practice			Soccer
	Portola practice	Baseball		
ROLPH	Horace Mann practice			Soccer
	Horace Mann "	Baseball		
ROSSI	Roosevelt Jr. High "	"		
	St. Ignatius Jr. "			Baseball
	Jr. High League	"		
SILVER TERRACE	Pelton Jr. High	"		Track
	Jr. High League Games	"		
WEST SUNSET	A. P. Giannini Jr. High practice	"		Soccer
	AAA League Games			Baseball
	Jr. High League Games	"		
SPEEDWAY MEADOWS	Washington J. V. practice			Baseball

Recreation Facility	School	Fall	Winter	Spring
GOLDEN GATE PARK	AAA League			Cross Country
STADIUM	Lowell practice	Football		
	Sacred Heart practice	"		
	Lowell J. V. "	"		
	Sacred Heart J. V. practice	"		
	J. V. League Games	"		
LITTLE REC	Polytechnic practice	Football		
	Polytechnic J. V. practice	"		

RECREATION AND PARK DEPARTMENT
CITY OWNED & DEPARTMENT OPERATED AUTOMOBILES
ASSIGNMENT AND USAGE FOR 1960

	Division	Individual Position or Title	Auto Dept. Number	Make of Auto	Year	Type of Auto	1960 Annual Mileage	Division Annual Mileage Usage
(1)	Admin.	General Manager	A-255	Olds-98	1957	4D-Sedan	11,499	
	Admin.	Bus. Manager	A-296	Stude-8	1960	4D-Sedan	6,164	
	Admin.	Commissary	A-293	Ramb-6	1960	4D-Sedan	6,723	
	Admin.	Cashier	A-253	Ford-6	1957	4D-Sedan	19,239	43,625 (Aver. 10,906)
(2)	Engineers	Superv. Engineer	A-259	Chev-6	1957	4D-Sedan	6,236	
	Engineers	Engineers	A-256	Chev-6	1957	Sta. Wagon	8,419	
	Engineers	Engineers	A-297	(Rambler (American-6	1960	4D-Sedan	7,201	21,856 (Aver. 7,285)
(3)	Park	Supv. Bldgs-Grounds	A-222	Ford-6	1955	4D-Sedan	9,629	
	Park	" " "	A-223	Ford-6	1955	4D-Sedan	10,840	
	Park	" " "	A-224	Ford-6	1955	4D-Sedan	12,198	
	Park	" " "	A-243	Ford-6	1957	4D-Sedan	12,024	
	Park	Supt. of Grounds	A-229	Ford-6	1955	4D-Sedan	10,605	
	Park	Supv. Roads-Paths	A-258	Chev-6		4D-Sedan	12,795	
	Park	Supv. Maintenance	A-280	Rambler-6	1959	4D-Sedan	8,063	
	Park	Supt. of Parks	A-295	Stude-Lark-8	1960	4D-Sedan	7,057	
	Park	Gen. Foreman Carp.	A-298	(Rambler (American-6	1960	4D-Sedan	9,543	
	Park	Act. Foreman Carp.	A-245	Ford-6	1957	4D-Sedan	8,266	
	Park	Supv. Golf Course Maintenance	A-292	(Rambler (American 6	1960	4D-Sedan	12,248	113,278 (Aver. 10,298)
(4)	Rec.	Supt. Recreation	A-294	Stude. Lark-8	1960	4D-Sedan	7,184	
	Rec	Asst. Supt. Rec.	A-281	Rambler 6	1959	4D-Sedan	7,350	
	Rec	Supv. Athletics	A-257	Chev-6	1957	4D-Sedan	8,038	22,572 (Aver. 7,524)
	TOTAL							201,331 (Aver. 9,587)

RECREATION AND PARK DEPARTMENT

USE OF, AND REIMBURSEMENT FOR, PRIVATELY OWNED AUTOMOBILES

Based on
Regular Auto - 10¢ per mile
Compact Auto - 7¢ per mile

Division	August			September			October			Average Per Month		
	Mile.	Amt. Due	Amt. Paid (72.014%)	Mile.	Amt. Due	Amt. Paid (68.398%)	Mile.	Amt. Due	Amt. Paid (58.7286%)	Mile.	Amt. Due	Amt. Paid (65.[illegible])
Admin.	-	-	-	-	-	-	-	-	-	-	-	-
Engr.	685	72.44	52.16	2,219	221.90	140.53	644	64.40	37.93	1,183	119.58	[illegible]
Park	2,483	221.53	150.54	1,027	102.70	70.25	2,210	201.01	118.05	1,907	175.08	[illegible]
Rec.	7,656	630.85	454.30	6,924	650.07	444.63	8,609	809.42	475.36	7,730	696.95	[illegible]
Misc.	-	-	-	184	18.40	12.59	592	59.20	34.66	259	25.87	[illegible]
TOTAL	10,824	924.82	666.00	10,354	993.07	668.00	12,055	1,134.03	666.00	11,079	1,017.48	[illegible]

RECREATION AND PARK DEPARTMENT

GROSS EXPENSE - REVENUE - BOND SERVICE COSTS - YEARS 1951 - 1961

1 Fiscal Year Ended June 30	2 Gross Operating Cost	3 Revenue Generated	4 Net Operating Cost	5 Bond Interest and Redemption	6 Total Cost	7 Cents in Tax Rate	8 % of Tax Rate
1951	$ 4,753,800	$1,126,612	$ 3,627,188	$ 177,211	$3,804,399	42.78	6.80
1953	5,075,479	944,100	4,131,379	491,970	4,623,349	47.34	8.35
1955	5,580,062	1,028,720	4,551,342	814,460	5,365,802	53.22	7.71
1956	5,824,208	1,048,700	4,775,508	800,852	5,576,360	54.09	7.70
1957	6,132,717	1,100,332	5,032,385	915,766	5,948,151	56.28	7.97
1958	6,933,718	1,141,883	5,791,835	898,458	6,690,293	61.93	8.40
1959	7,374,374	1,304,248	6,070,126	1,305,757	7,375,883	66.92	8.85
1960	7,737,479	1,317,968	6,419,511	1,064,477	7,483,988	66.41	8.21
1961	9,815,000 *	1,257,549 *	8,557,451	1,101,777	9,659,228	83.18	9.81
1962	9,637,449 **	1,300,000 *	8,337,449	1,234,102	9,571,551	82.42	9.71

* Estimated
** Proposed - Mayor's recommendation - Includes $1,494,610 capital items.

Sources - Expenditures - Controller's Annual Report Fiscal 1960
Bond Interest and Redemption - Controller's Department.

Giving effect to the recommendations regarding expenses and revenue elsewhere in this report, the 1961-62 figures as recommended by the Major would be

8,070,[illegible] (a)	1,857,549	6,213,290	1,234,102	7,447,392	64.13	7.56

(a) Includes [illegible] for capital items

RECREATION AND PARK DEPARTMENT
GROSS OPERATING EXPENSE - REVENUE - NET OPERATING EXPENSE - BOND CHARGES - TAX FUNDS ALLOCATED
1951 - 1961 FISCAL YEARS

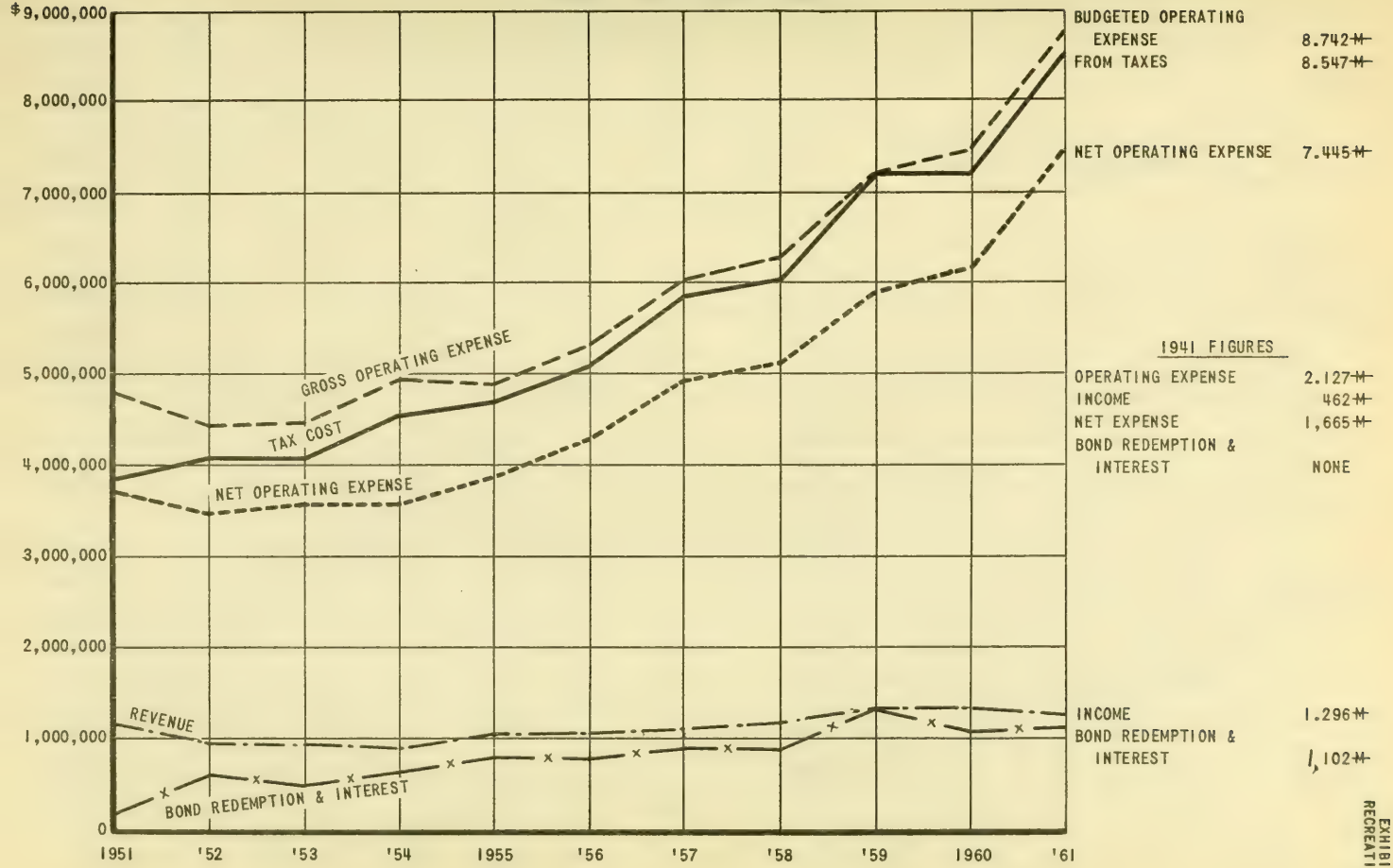
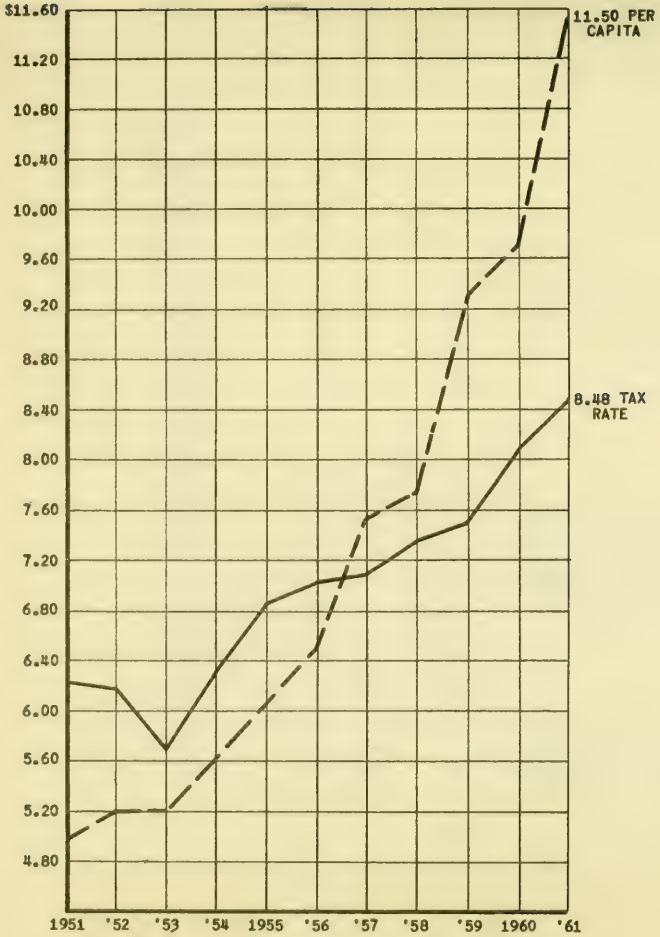


EXHIBIT XI
RECREATION & PARK

TAX RATE - PER CAPITA COST
1951 - 1961 FISCAL YEARS



THIS CHART SHOWS THE SAME FACTORS IN TERMS OF CONSTANT DOLLARS.
(1947 - 49 = 100)

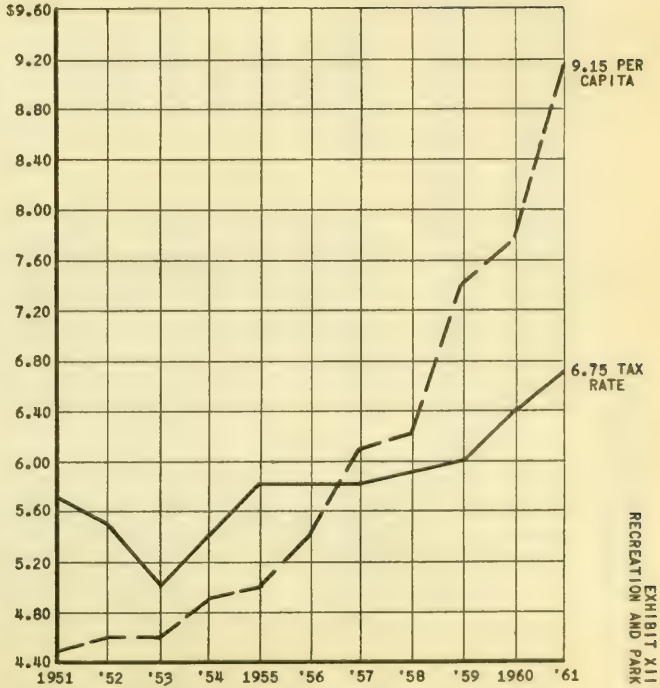


EXHIBIT XII
RECREATION AND PARKS

1959 GROSS EXPENDITURES FOR RECREATION AND PARK EXCLUDING CAPITAL OUTLAY

(Cities having population of 500,000 to 1,000,000 in 1950 Census)

City	Population	Expenditures	Gross Cost Per Capita
Washington, D.C.	802,178	$7,828,000	$9.75
San Francisco	775,357	7,446,000	9.60
Minneapolis	521,718	3,948,000	7.56
St. Louis	856,796	6,006,000	7.01
Boston	801,444	4,952,000	[illegible].13
Baltimore	949,708	5,368,000	5.15
Cleveland	914,808	4,891,000	5.34
Pittsburgh	676,808	3,441,000	5.09
Buffalo	580,132	2,891,000	4.98
New Orleans	570,445	2,715,000	4.76
Cincinnati	503,998	2,266,000	4.49
Milwaukee	637,392	2,577,000	4.04
Houston	596,163	2,254,000	3.78

Source: U.S. Bureau of the Census "Compendium of City Government Finances in 1959."

EXHIBIT XIV

1959 NET EXPENDITURES FOR RECREATION AND PARK
EXCLUDING CAPITAL OUTLAY

(Cities having population of 500,000 to 1,000,000 in 1950 Census)

City	Population 1950 Census	Gross Expenditures	Revenue Generated	% of Gross Expense	Net Expenditure	Net Cost per Capita
Washington	802,178	7,828,000	135,000	1.7	7,693,000	[illegible]
San Francisco	775,357	7,446,000	1,700,000	22.8	5,746,000	[illegible]
Boston	801,444	4,952,000	122,000	2.4	4,830,000	[illegible]
St. Louis	856,796	6,006,000	1,054,000	17.5	4,952,000	[illegible]
Pittsburgh	676,806	3,441,000	31,000	0.9	3,410,000	[illegible]
Minneapolis	521,718	3,948,000	1,427,000	36.1	2,521,000	[illegible]
Baltimore	949,708	5,368,000	961,000	17.9	4,407,000	[illegible]
Buffalo	580,132	2,891,000	449,000	15.5	2,442,000	[illegible]
Cincinnati	503,998	2,266,000	360,000	15.9	1,906,000	[illegible]
Cleveland	914,808	4,891,000	1,513,000	30.9	3,378,000	[illegible]
New Orleans	570,445	2,715,000	772,000	28.4	1,943,000	[illegible]
Milwaukee	637,392	2,577,000	575,000	22.3	2,002,000	[illegible]
Houston	596,163	2,254,000	538,000	23.4	1,716,000	[illegible]
All Cities Except Washington and San Francisco	7,609,410	41,309,000	7,802,000	18.8	33,507,000	4.40
All Cities Except Washington, San Francisco, Boston and Pittsburgh	6,131,160	32,916,000	7,649,000	23.2	25,267,000	[illegible]

Source: U.S. Bureau of the Census "Compendium of City Government Finances in 1959."

PER CAPITA 1959 EXPENDITURES FOR RECREATION AND PARK

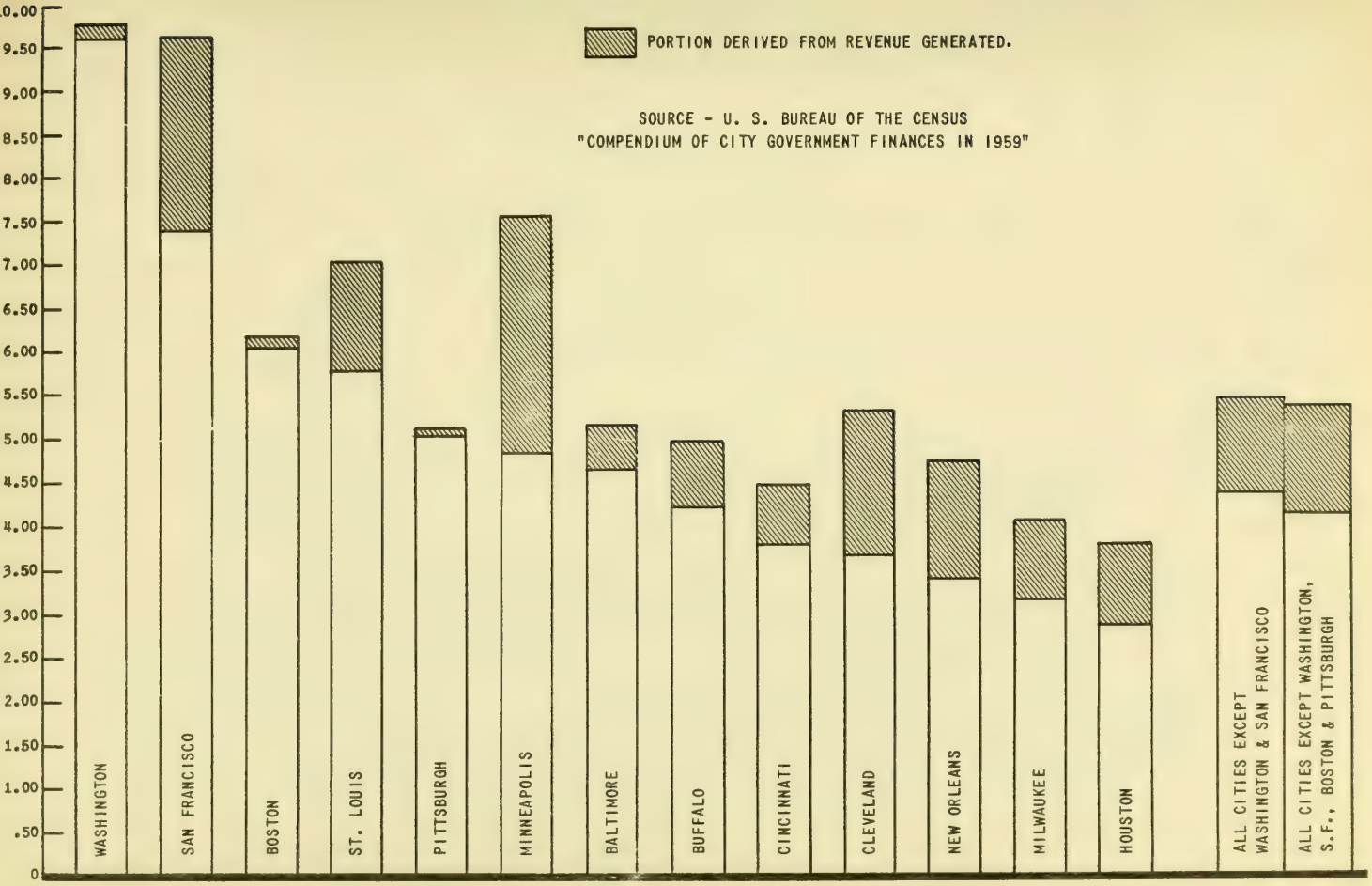


EXHIBIT XV
RECREATION AND PARK

TABULATION OF MATURITIES

RECREATION AND PARK BOND ISSUES

		Outstanding 1947 Issue	Outstanding 1955 Issue	Total Redemption	Total Outstanding
Outstanding 6/30/60		$6,013,000	3,460,000		9,473,000
Maturing to 6/30:	1961	622,000	260,000	882,000	8,591,000
	1962	677,000	260,000	937,000	7,654,000
	1963	692,000	260,000	952,000	6,702,000
	1964	747,000	260,000	1,007,000	5,695,000
	1965	707,000	260,000	967,000	4,728,000
	1966	613,000	260,000	873,000	3,855,000
	1967	460,000	260,000	720,000	3,135,000
	1968	460,000	260,000	720,000	2,415,000
	1969	460,000	260,000	720,000	1,695,000
	1970	295,000	260,000	555,000	1,140,000
	1971	200,000	260,000	460,000	680,000
	1972	80,000	260,000	340,000	340,000
	1973	-	260,000	260,000	80,000
	1974	-	60,000	60,000	20,000
	1975	-	20,000	20,000	-
		$6,013,000	3,460,000	9,473,000	-
Authorized but unissued			3,100,000		

XI

RECREATION AND PARK COMMISSION

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Functions	37
Organization	37
Meetings	39
Specific Recommendations	39

RECREATION AND PARK COMMISSION

Functions

The Recreation and Park Commission acts in the following functional groups:

1. Executive:

   (a) Selection of the General Manager of the Department

   (b) Reviews and approves, or passes resolutions recommending approval of administrative actions.

   (c) Approves use of Recreation and Park locations and facilities by hobby, civic, commercial, and other groups or individuals.

   (d) Approves contracts with concessionaires or lessees.

   (e) Review and approve plans for development of facilities.

2. Quasi-legislative:

   (a) Establishment of policies or formulation of recommendations on policies.

   (b) Controls revenues and passes on budgets, requests for appropriation, transfers of funds and special expenditures, such as progress and final payments on contracts.

   (c) Controls expenditures from bond funds and public trust funds.

3. Quasi-judicial:

   (a) Hearing appeals from the public regarding proposed plans.

Organization

The Recreation and Park Commission is composed of seven members appointed by the Mayor for staggered four-year terms. At least two members must be women. The Commission members elect a President and a Vice President from among their members.

Each Commissioner is Chairman of a committee concerned with specific area activities of the Department and, in turn, is Co-Chairman of several committees. Current primary committee assignments are as follows:

Commissioner Haas (President)	Budget and finance Maintenance of buildings, structures equipment Public relations Small boats
Commissioner Coffman (Vice President)	Candlestick Park Kezar Stadium and Pavilion Aquatic Park Maritime Museum
Commissioner Bercut	Equestrian activities Trails and roadways Irrigation systems Maintenance of parks
Commissioner Casey	Personnel Recreation programs Camping Maintenance of playgrounds
Commissioner Conway	Golf courses Boat Harbors Leases and concessions Land acquisition and sales
Commissioner Herz	McLaren Park Palace of Fine Arts Coit Tower Hall of Flowers
Commissioner Moore	Arboretum Horticultural development and maintenance Japanese Tea Garden Zoological Gardens Storyland

As a committee chairman, the Commissioner works with staff members of the Department in studying problems, developing recommendations to be submitted to the full Commission, and presenting recommendations for Commission approval; reviewing proposed plans and programs and making recommendations thereon to the Commission, and handling public contacts on assigned activities.

The President of the Recreation and Park Commission is an ex-officio member of the board of trustees of the California Palace of the Legion of Honor, Art Commission, and the board of trustees of the M. H. de Young Memorial Museum.

In addition to the Commissioners, there is a Secretary to the Commission (who also acts as an Executive Secretary to the General Manager of the Department) and a clerk-steno.

Meetings

Regularly scheduled meetings of the Recreation and Park Commission are held on the second and fourth Thursday of each month. Special meetings may be called when action must be taken before deadlines, such as expiration of bids unless contract awarded within 21 days of opening bids, or important plans on which action must be expedited.

Specific Recommendations

1. Within provisions of the Charter, establish policies and administrative rules to permit the General Manager to approve specific actions without ratification of the Commission.

Examples:

(a) Granting licenses for mooring of boats at the Yacht Harbor.

(b) Scheduling use of Recreation and Park properties for public meetings or for other purposes.

(c) Scheduling of floral displays at the Conservatory or Civic Center Plaza.

(d) Progress or final payments on contracts previously approved by the Commission.

(e) Permits to locate or relocate public utility facilities.

(f) Routine orders for work and/or service.

(g) Property damage claims under specified monetary limits

2. Charter changes

(a) Eliminate the executive and administrative functions presently performed by the Recreation and Park Commission; limit the functions to:

(1) Providing opportunities for the public to express views relative to plans to construct or reconstruct facilities, or relative to policies.

(2) Providing advice to the Mayor and the General Manager relative to policies regarding recreation and park facilities and programs.

This action will strengthen the authority, responsibility, and accountability of the General Manager and Division Heads in the Department. It will also eliminate the by-passing of the General Manager by Commissioners in dealing with staff members.

(b) Delegate to the General Manager present authorities granted the Commission in existing Charter Sections:

(1) Acceptance of gifts and donations in the name of the Department. (Section 19d)

(2) Appointment of non-civil service and exempt employees. (Section 20)

(3) Approve budget for submission to Mayor for review prior to approval by the Board of Supervisors. (Section 69)

(4) Requests for allocation of appropriations. (Section 72)

(5) Transfer of funds. (Section 77)

(6) Award of contracts to low bidders, or reject bids. (Section 95)

(7) Others as necessary.

III

RECREATION AND PARK DEPARTMENT

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RECREATION AND PARK DEPARTMENT

Functions

The Recreation and Park Department is responsible for the planning, development, operation, and maintenance of recreation and park properties and programs and the negotiations and contractural arrangements with lessees and concessionaires using Recreation and Park Department properties or facilities.

Organization

The elements of the organization as found when this study started were:

1. The Recreation and Park Commission.

2. The General Manager and his staff.

3. Divisions:

   a. Administration and Business Division
   b. Recreation Division
   c. Park Division
   d. Engineering Division
   e. Zoo Division

(See Present Organization Chart, Exhibit XVII)

A discussion of the Recreation and Park Commission has preceded and recommendations have been made regarding its proposed functions and responsibilities.

Each of the Divisions is treated in succeeding sub-sections of this task force report.

The General Manager's position was established by Charter amendment prior to the merger of the Recreation and Park Departments in 1950. The General Manager is appointed by and responsible to the Recreation and Park Commission for administration of policies and procedures established by that body.

The General Manager's personal staff consists of:

1. An Executive Secretary, (B-86), who also acts as Secretary, Recreation and Park Commission.
2. A Senior Clerk - Stenographer (B-412).
3. A Recreation Director (R-53) who acts in the capacity of publicity writer and public information representative.
4. A Chauffeur (C-1) who drives the City car assigned to the General Manager.

Specific Recommendations

1. Include the Recreation and Park Department in the proposed Culture and Recreation Department. (See proposed "Reorganization Plan" in a separate section of this report).

2. Delegate to the General Manager the necessary authority for management and administrative actions necessary for the accomplishment of objectives and responsibilities assigned to him. Hold him accountable for prosecution of policies developed by the proposed Cultural and Recreation Commission and approved at the proper executive level within the City and County management. Also, hold him accountable for the economic performance of the Department.

3. a. Establish a position of Departmental Personnel officer (Code 1270) reporting to the General Manager. Examples of duties to be assigned to this position are:

(1) Consults with and advises department management and supervisory personnel, employees and their representatives and others on the interpretation and application of the civil service provisions of the Charter, related ordinances, civil service rules and regulations, personnel policies, standards, procedures, and other personnel problems.

(2) Screens classification requests; conducts classification studies; advises management on the merits of requests for reclassification.

(3) Cooperates with supervisory personnel in the assignment, reassignment, replacement, and transfer of personnel, and other related in-service personnel activities.

(4) Cooperates with the civil service commission in matters relating to the expediting of personnel transactions, recruitment, placement, employee evaluation, training programs and other personnel services and activities.

(5) Supervises the preparation of personnel documents and maintenance of personnel records; analyzes personnel records to determine cause of turnover and other related problems.

(6) Reviews and reports on the service of employees; investigates and reports on disciplinary charges against employees; investigates other related matters such as employee grievances, reductions in force and makes reports thereon.

(f) May participate in conferences related to effective personnel services, budgeting, planning and over-all operation of the departmental personnel program.

The number of employees in the Recreation and Park Department, both on a full-time or part-time basis, and the emphasis that should be placed on in-service training and performance evaluation justifies the establishment of this position.

b. Utilize the authorized employment in the Recreation Division currently assigned to personnel activities and one clerical employment in the Administration and Business Division to provide the manpower for staffing this proposed unit.

4. Reclassify position of Recreation Director (R-58) assigned to publicity and public information to Publicity Representative. Evaluate the effectiveness of publicity activities in order to reduce the volume of news releases prepared and distributed.

5. Eliminate the position of Chauffeur (O-1); cause the General Manager to drive his own vehicle.

The Proposed Organization Chart, Exhibit XVIII, reflects the proposed changes.

MARITIME MUSEUM

Operation and Function

The Maritime Museum, located in Aquatic Park, is operated by the San Francisco Maritime Association, a non-profit, educational corporation, which leases the building from the City for one dollar per year. The Museum houses a valuable collection of ship models, figureheads, bells, photographs, etc., donated by steamship companies and the general public interested in sea lore. There is also an excellent compact library for staff research.

The Museum, under the direction of Carl Kortum, Director of the San Francisco Maritime Museum, has developed and grown to its present status through his untiring effort. The Museum opened in May, 1951. Attendance the first year was 225,000 and is currently at the rate of 200,000 annually.

In 1954 the San Francisco Maritime Association purchased the historic sailing ship Balclutha now on exhibit at Fishermans Wharf. The Balclutha attracts approximately 200,000 visitors paying 50¢ each, resulting in gross revenue of $100,000 per year. This furnishes nearly all of the Museum's present operating income, for there is no charge at the building itself. The balance comes from donations and members of San Francisco Maritime Association, who pay annual dues of $10.

The cost of operation of the Balclutha and of the Museum except for the salary of the Director, who is a Civil Service employee of the City, comes from admission charges from the Balclutha. Park Division provides janitorial, gardening, and security services from personnel assigned to Aquatic Park.

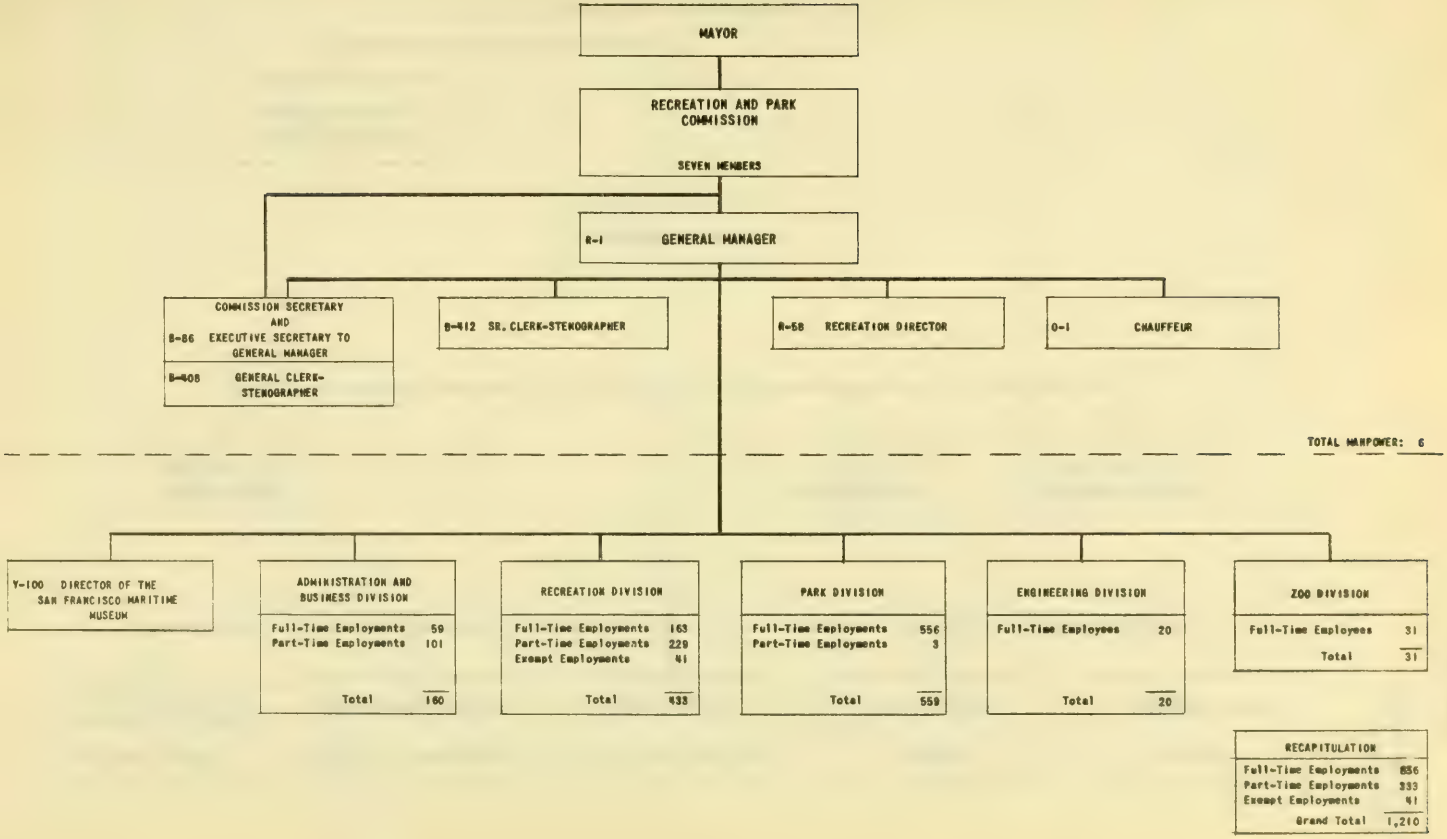
Specific Recommendation

1. Greater administrative control be exercised by the General Manager and the Director of the San Francisco Maritime Museum. While the Maritime Museum, and its related activities, is predominantly supported by the San Francisco Maritime Association, the Director is paid by the City and is considered an employee of the Recreation and Park Department.

2. Reschedule existing personnel to provide greater security coverage. This might be accomplished by assigning a janitor to the 4:00 p.m. to midnight shift and rescheduling the watchman to the midnight to 8:00 a.m. shift.

CITY AND COUNTY OF SAN FRANCISCO
RECREATION AND PARK DEPARTMENT

PRESENT ORGANIZATION

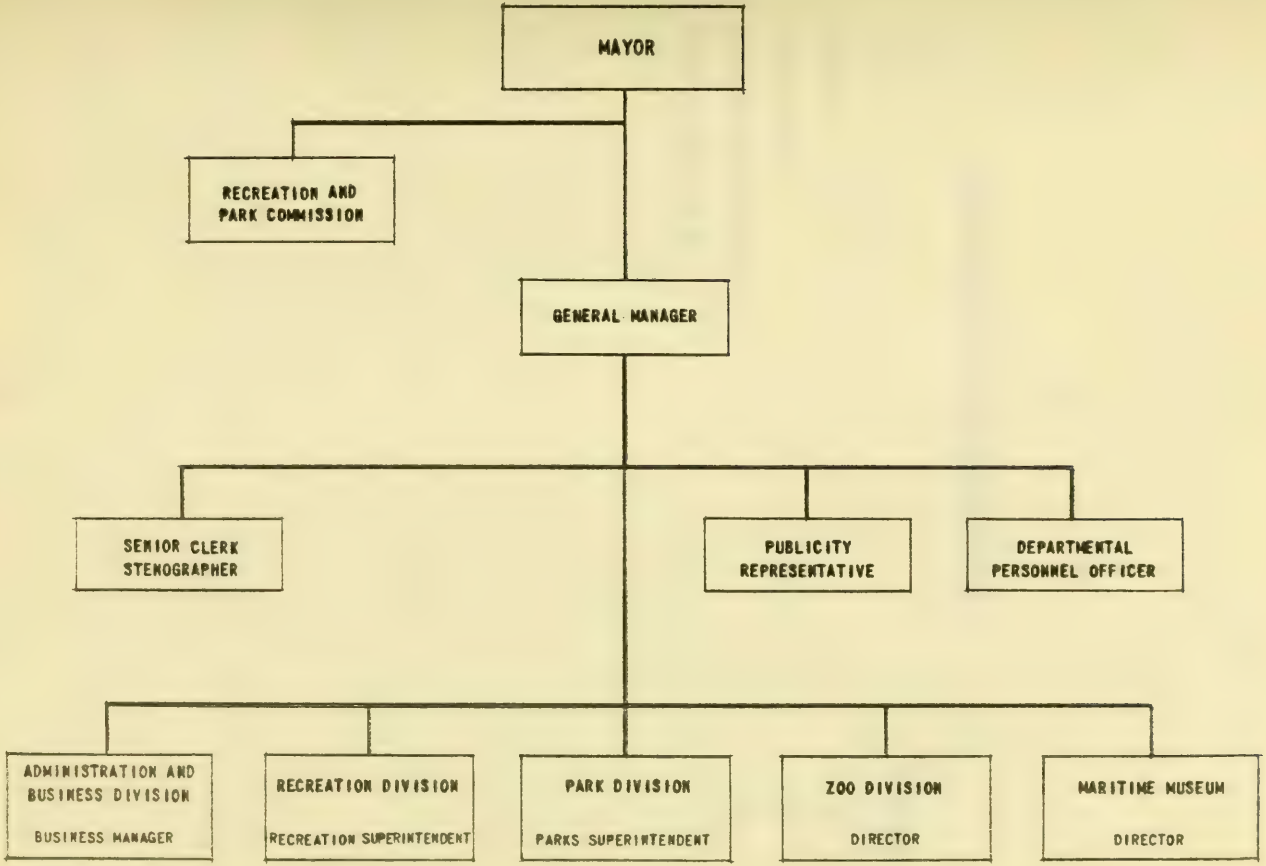


RECREATION & PARK
EXHIBIT XVII

DECEMBER, 1960

RECREATION AND PARK DEPARTMENT

INTERIM PROPOSED ORGANIZATION



RECREATION & PARK
EXHIBIT XVIII

MAY, 1961

IV

ADMINISTRATION AND BUSINESS DIVISION

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ADMINISTRATION AND BUSINESS DIVISION

Functions

The Administration and Business Division is responsible for: The purchasing, accounting and payroll operations of the Department; providing stenographic pool services for the Department; operation of Kezar Stadium and Pavilion, Candlestick Park, and the Municipal Yacht Harbor; supervision of contract commitments with all concessionaires who have contracts with the Department; ticket sales at Storyland; and the operation of rides and the refreshment stand at Children's Playground in Golden Gate Park.

Organization

The Business Manager has direct supervision over all sections. He negotiates all contracts for lease of the two stadia and the Pavilion, and the contracts for all concessions that are directly granted by the Department. He also is responsible for the assembly, preparation and presentation of the annual budget of the Department. Through the Accounting and Purchasing Section, he is responsible for the administration of the budget. He originates and follows through all requests for transfer of funds, and for supplemental appropriations.

The division consists of a number of sections which are summarized separately below:

1. Accounting: Receives the annual budget requests from each of the divisions, compiles and classifies Objects of Expenditure, and assembles data into proper form for presentation to the Commission and Mayor. Keeps records for control of expenditures within the budget.

2. Personnel (Time Rolls): Receives daily time reports form employees of the Department, posts time to semi-monthly payroll form, computes and verifies individual amounts to be paid (before taxes or other deductions). Payrolls are then sent to the Controller's office for completion of payroll work.

3. Purchasing and Issuing: Receives field requisitions for services, supplies, and equipment, and prepares Request for Purchase Order forms and sends to City Purchaser. Keeps records of requisitions and Purchase Orders, and notifies Controller of receipt of goods and completion of services.

Orders and distributes Stores Items from Storerooms, and maintains inventory of all Storekeeper items.

4. Kezar Stadium & Pavilion and Candlestick Park: Stadium Manager has charge of all operations (except concessionaires) at Kezar Stadium and Pavilion, and of all activities other than Giant games at Candlestick Park.

5. Commissary Units: This section is responsible for the operation of rides and the refreshment stand at Children's Playground, and for ticket sales at Storyland. (Refreshment stand at Fleishhacker Playfield was taken over by the Zoological Society in February, 1961.) It also has the responsibility for supervising contract commitments of concessionaires at Kezar and all other department operations.

6. Camp Mather: This is a summer camp in the Sierras. It accommodates about 2,600 people per season. The camp manager and a man in charge of reservations are "borrowed" from other sections. All other employees, except a full-time gardener, are temporary.

7. Municipal Yacht Harbor: Harbormaster and Watchmen are responsible for policing and patrolling the Yacht Harbor. They assign visitors' berths, and keep a log of arriving and departing boats. Billing for berth space, reporting of payments, and re-assignment of vacated berths are presently done by an employee in the Business Manager's office.

8. Stenographic Section: This section prepares letters, reports and mimeographed material for all divisions.

(See Present Organization Chart, Exhibit XIX.)

Specific Recommendations

1. Centralize all payroll work for the City, involving computation of amounts due, computation of deductions, and preparation of pay checks This could affect four employees in the Administration and Business Division.

2. Transfer the following activities from the Personnel Time Roll Section:

Activity	Transfer to
Posting time rolls	Accounting Section
Processing personnel forms and records	Proposed Personnel Unit under General Manager

3. Consolidate under one supervisor the operations now covered by:

(1) Commissary Units
(2) Kezar (Stadium and Pavilion) and Candlestick Park
(3) Camp Mather

This would eliminate one position, which would be taken care of by the imminent retirement of the present stadium manager.

4. Appoint replacements for retiring key employees prior to such retirement, and permit them to work with said employees for a reasonable period of time prior to their retirement. This would save for the City the knowledge and experience gained by the key employees, which is presently lost.

5. Put the entire operation of the Yacht Harbor in the hands of a Harbor Master, including assignment of berths, billing for berth space, and collection of such billed amounts.

6. Consider the use of an Armored Car service instead of a City-employed cashier in collecting receipts from Department-operated units. This would eliminate the position of one B103 Cashier and release one uniformed police officer and one City-owned vehicle for other use. It is believed that this would result in a reduced cost for this operation.

7. Acquire a postage meter for use by the Stenographic section.

8. Eliminate the position now held by a Head Clerk (B-234) upon his retirement this year.

9. Reassign the duties of a Senior Bookkeeper (B-6) that pertains to the functions of the Business Manager, and return this employee to full time work in the Accounting Section, to which his time is charged.

10. Give serious consideration to the consolidation of all City accounting operations, in connection with a centralized data processing operation. This would reduce the need for the present decentralized departmental accounting units. This could affect 5 employees in the Administration and Business Division.

The above recommendations are reflected in the Proposed Organization Chart, Exhibit XX.

CITY AND COUNTY OF SAN FRANCISCO
RECREATION AND PARK DEPARTMENT - ADMINISTRATION AND BUSINESS DIVISION

PRESENT ORGANIZATION

B-32 BUSINESS MANAGER

- B-6 ACCOUNTANT II
- B-512 GENERAL CLERK-TYPIST
- B-23% HEAD CLERK

YACHT HARBOR

C-160	Harbor Master	1
C-152	Watchman	3
C-152	Watchmen (PT)	
	Total	4

ACCOUNTING

B-10	Accountant III	1
B-4	Accountant I(1)	4
B-2	Account Clerk	1
B-103	Cashier	1
B-222	General Clerk	1
	Total	8

PERSONNEL AND TIME ROLL

B-228	Senior Clerks	2
B-2	Account Clerk	1
B-512	Gen.Clerk Typist	3
B-222	General Clerk	1
	Total	7

STENOGRAPHIC

B-228	Senior Clerk	1
B-408	Gen.Clerk Steno.	8
B-512	Gen.Clerk Typist	1
B-210	Office Assistant	1
B-454	Telephone Operator	1
	Total	12

PURCHASING AND ISSUING

B-228	Senior Clerk	1
B-512	Gen.Clerk Typist	3
B-210	Office Assistant	1
J-4	Laborer	1
	Total	6

COMMISSARY UNITS

R-24	Supvr.Restaurants and Playgrounds (2)	1
R-23	Asst.Supvr.Restaurants and Playgrounds	1
R-130	Foreman Recr.Activ.	2
I-53	Vendors	5
W-106	Ride Attendant	2
I-11	Griddle Cook	1
I-53	Vender Helper(P.T.A.N.)	2
W-108	Ride Att.Helper (P.T.A.N.)	2
B-512	Gen.Clerk Typist	1
C-102	Janitress	1
	Total Full-Time	16
	Total Part-Time	2
	Total	18

KEZAR STADIUM AND PAVILION

R-20	Asst.Dir.Rec.Activities Stadium Manager	1
C-104	Janitor	2
R-54	Athletic Attendants (P.T.A.N.)	20
C-102	Janitress (P.T.A.N.)	10
C-104	Janitors (P.T.A.N.)	25
	Total Full-Time	3
	Total Part-Time	55
	Total	58

CAMP MATHER

R-102	Camp Manager (2)	
B-4	Accountant I(1)	
058	Gardener	1
I-10	Asst.Cook (Temp.)	3
I-16	Chef (Temp.)	1
I-12	Cook (Temp.)	2
I-6	Pastry Cook(Temp.)	1
C-104	Janitor (Temp.)	1
R-101	Camp Asst. (Temp.)	32
O-58	Gardener(3)(4 mo.)	
O-68	Oper.Engr.(%)(4 mo.)	
R-66	Rec.Director (4 mo.)	1
	Emer Home.Steward(4 mo.)(1)	
	Total Full-Time	1
	Total Part-Time	42
	Total	43

(1) One B-4 Accountant I devotes 7 months to Camp Mather activities.

(2) R-24 Supervisor, Restaurants & Playgrounds devotes 4 months per year to Camp Mather activities as Camp Manager.

(3) O-58 Gardener assigned to Camp Mather for 4 months during season, shown in Park Division manpower.

(4) O-68 Operating Engineer assigned to Camp Mather for 4 months during season, shown in Park Division manpower.

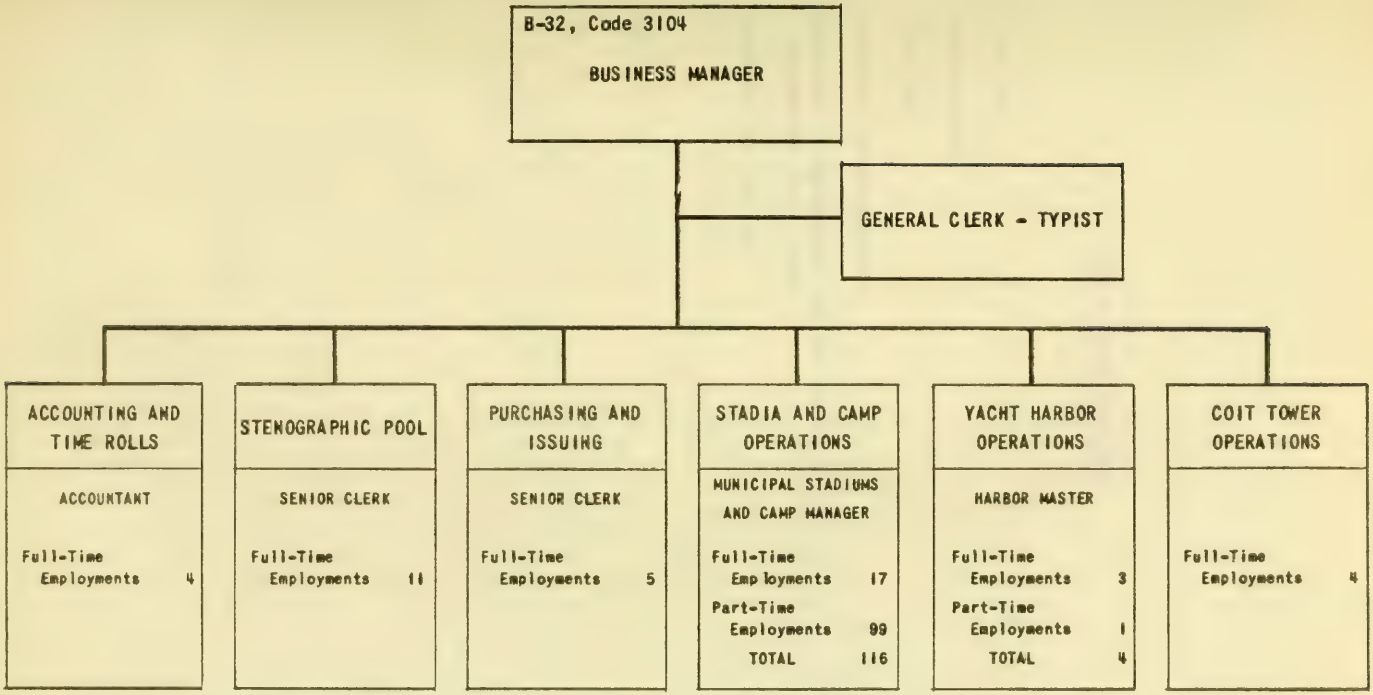
RECAPITULATION

Full-Time Employments	59
Part-Time Employments	101
Total	160

DECEMBER, 1960

RECREATION & PARK
EXHIBIT XIX

PROPOSED ORGANIZATION



RECAPITULATION	
FULL-TIME EMPLOYMENTS	51
PART-TIME EMPLOYMENTS	100
TOTAL	151

MAY 1961

RECREATION & PARK
EXHIBIT XX

V

RECREATION DIVISION

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RECREATION DIVISION

Function

The Recreation Division under the direction of the Superintendent of Recreation and the Assistant Superintendent of Recreation is responsible for planning, supervising and directing the operation of free play areas, gymnasia, swimming pools, community recreation centers, camps, tennis courts, boating facilities and other recreational facilities composing a city-wide recreation program.

Organization

This Division (see Present Organization Chart, Exhibit X[illegible]) is composed of the following sections:

1. Athletics - (Male): This section, under the supervision of a Supervisor of Athletics - (Male) (R105 or Code 3276), consists of one Supervising Director and two Recreation Directors and is responsible for direction and coordination of city-wide recreation activities in four units of the Athletic Section (men and boys) as follows:

   (a) Industrial Association Athletic activities (men)
   (b) Adult and Boys' baseball leagues.
   (c) Boys' playground recreation leagues and tournaments in various sports.
   (d) City-wide recreation men's athletic programs. Example: Soccer and softball.

There appears to be some lost time in this operation due to a volume of schedules, rules and regulations, entry forms, as well as printed game, league and tournament results.

2. Athletics - (Female): This section, consisting of a Supervisor of Athletics - (Female) (R105 or Code 3276) and one Supervising Recreation Director, is responsible for coordination and supervision of the activities in three units of the athletic section (women and girls) and at the Golden Gate Tennis Clubhouse and courts.

   (a) Industrial Association women's athletic activities.
   (b) Girl athletic playground leagues, tournaments and programs.
   (c) City-wide recreation women's athletic programs.

3. Aquatics: This Section, consisting of the Supervisor of Aquatics (R106D or Code 3216), two Matrons - Swimming Pool (Clerk-Typist) on the staff, and 36 full time and 108 part-time employees operating the swim pools, plans, organizes, supervises and directs the city-wide aquatic activities, programs and facilities of the Recreation Division. The facilities include seven indoor and two outdoor pools, the Lake Merced Sport Center, Aquatic Park, and Phelan Beach.

4. Dramatics and Dancing: This Section consists of the Supervisor of Dramatics and Dancing (R106A or Code 3242), a Supervising Director (R58), a Seamstress and a laundress on the staff, and 7 part-time dance instructors (R56 Ex.) and 1 part-time Recreation Assistant. Also 2 full time Recreation Directors and 2 part-time Recreation Assistants are at Storyland. This Section plans, assists in organizing, teaching, and directing the many adult and youth programs in the field houses. Also as many of these activities require music, there is a close tie-in with the Music Division. Instructs and supervises special groups who appear in Civic celebrations.

5. Music: This Section consists of the Supervisor of Music (R106C or Code 3252), one part time Recreation Director, two exempt Recreation Directors, and 22 pianists on call as needed. Provides music (pianists) for musical programs such as "Rhythm Singing" at various field houses. Also arranges places for outside musical groups to meet at field houses. Gives instruction to some musical groups at Recreation Center building and provides ukuleles, and drums to one group.

6. Junior Museum: This Section consists of a Supervising Director (R58 or Code 3252), a Curator, two full-time Recreation Directors, and six part-time Recreation Directors. They operate the Josephine D. Randall Junior Museum on Corona Heights. An Auxiliary Committee also functions to foster public interest and promote development of the Museum. The Museum offers exhibits of a limited number of small animals and reptiles, and classes in arts and crafts, science, and nature studies. Conducted tours are held daily for school groups and others. The Junior Museum building has a theater at which motion pictures are shown and an auditorium where about 16 clubs meet free of charge. Not all the clubs are science groups. Facilities for model airplane building, woodworking, model railroad, and telescope making are available.

7. Photography Center: This Section consists of a Supervising Director - Photography (R58 or Code 3258), one full-time Recreation Director and 11 exempt Recreation Directors, each specializing in a special field of Photography. Large and well furnished quarters are provided for developing, enlarging, and printing photographs, as well as a meeting room where seven Camera Clubs and groups meet free of charge. This is an exceptionally high-cost activity. There is a "Special Activities Committee" operating here who put on lectures, competitions, etc., and who charge a fee for admission, none of which accrues to this Department.

8. District "A" Recreation Units: This Section, under the direction of a Supervising Director and staff at 15 installations consisting of 16 full-time Recreation Directors, 18 part-time Recreation Directors and 4 Recreation Assistants, promotes and coordinates recreation programs and activities in approximately one-fourth (15) of the Recreation Centers and playgrounds in the city. This includes supervising and training assigned personnel and study and preparation of recommendations relative to recreational needs of the area. The Supervising Director represents the Department before civic and neighborhood groups within the area.

9. District "B" Recreation Units: This Section, under the supervision of a District Supervising Director (R58 or Code 3288) and consisting of 27 full-time and 37 part-time recreation directors, directs, promotes, and coordinates recreation programs and activities for approximately one-fourth (20) of the Recreation Centers and playgrounds in the city. This includes supervising and training assigned personnel, study and preparation and recommendations relative to recreational needs of the area. The Supervising Director represents the Department before civic and neighborhood groups within the area.

10. District "C" Recreation Units: This Section, under the direction of a Supervising Director (R58 or Code 3288) and staff at 22 installations consisting of 17 full-time Recreation Directors, 21 part-time Recreation Directors, and 12 Recreation Assistants, promotes and coordinates recreation programs and activities for approximately one-fourth (18) of the Recreation Centers and playgrounds in the city. This includes supervising and training assigned personnel, study and preparation of recommendations relative to recreational needs of the area. The Supervising Director represents the Department before civic and neighborhood groups.

11. District "D" Recreation Units: This Section, under the supervision of a district Supervising Director (R58 or Code 3288) and consisting of 18 full-time and 30 part-time recreation directors, directs, promotes, and coordinates recreation programs and activities for approximately one-fourth (19) of the recreation centers and playgrounds in the city. This includes the supervising and training of assigned personnel, study and recommendations relative to recreational needs of the area. The Supervising Director represents the department before civic and neighborhood groups within the area.

12. Personnel: One Supervising Director (R58 or Code 3290), handles the assignment of full-time, part-time and relief recreation directors to recreation units and assists in developing the recreation personnel services (salaries and wages costs) required for the annual budget. This includes interviewing applicants and maintaining the Division's personnel records.

13. Equipping and Furnishing Recreation Units: One Supervising Director (R58 or Code 3290) performs duties in analyzing and planning the needs of recreational activities insofar as furniture and equipment are concerned and making recommendations regarding requirements. This includes planning the equipping and furnishings of new and existing recreation centers and field houses, research on new types of equipment, checking and inspection of new materials and merchandise, expediting of delivery, and installation of equipment.

14. Regulation of Park Areas and Facilities: One Supervising Director (R58 or Code 3290) handles requests, reservations, assignments and regulations for the use of certain Recreation and Park Areas and facilities by special groups and organizations. This includes such responsibilities as supervision of day camping program, picnic areas, Wawona Clubhouse, Anglers Lodge, Model Yacht Club, dog training areas, Horseman's Equitation Area, Sigmund Stern Grove clubhouse and facilities, contacts with other city-wide agencies using recreation facilities for camping programs and arrangements for municipal transportation for participants in city-wide specialized recreation programs.

15. Tiny Tots and Senior Citizen Activities: This section is under the supervision of a Recreation Director (R56 or Code 3284) who prescribes the form of the program, assigns program to various field houses and directs the playground personnel in the operation of the program. Also supervises the annual Senior Citizens Hobby Show at the Emporium. Maintains attendance records, a time-consuming clerical function.

16. Golf Course Activities, Balboa and Golden Gate Park Stadiums and Coit Tower Operations: This section under the supervision of an Assistant Director of Recreational Activities (R20 or Code 3220) who reports directly to the Superintendent of Recreation, consists of 18 golf starters, seven janitors and one vendor. The Assistant Director of Recreational Activities is responsible for direct supervision of the golf course starters and janitors at the four municipal golf courses and the assignments, schedules, tournaments and rules and regulations pertaining to the courses. He is also responsible for special events and receipts at all paid events in the Balboa Stadium and Golden Gate Park Stadium and the operation of Coit Tower.

Staffing

The 163 full-time, 229 part-time, and 41 exempt employees are distributed among the sections as shown on the Present Organization Chart, Exhibit XXI.

Specific Recommendations

Organization

The organization of this Division should be revised as outlined in chart entitled Proposed Organization, Exhibit XXXI.

Under the present arrangement one Assistant Superintendent of Recreation and an Assistant Director of Recreational Activities (golf) report directly to the Superintendent of Recreation. In turn, the Assistant Superintendent has 14 key management-supervisory people and one Recreation Director reporting directly to him.

The proposed re-organization would result in the supervisors of special activities sections answering directly to the Superintendent, while the Assistant Superintendent would supervise and direct the field activities, including the operation of aquatic facilities, playgrounds, and golf courses.

This change should result in a better balanced distribution of supervisory responsibilities; furnish closer on-the-job direction; and provide a more complete analysis of personnel work operations, methods, individual performance, progress and attitudes.

1. Athletics: This section would be supervised by one Athletic Supervisor, (R105-Code 3276) reporting directly to the Superintendent of Recreation. Under him would be 2 Supervising Recreation Leaders (R58-Code 3290), one for men's athletic activities and one for women's athletic activities, to whom the Athletic Supervisor would delegate responsibility to a proper extent. The Supervising Recreation Leaders would each have one Senior Recreation Leader (Code 3284) to assist them in their respective duties.

2. Dramatics, Dancing and Music: The present two sections would be combined into one section entitled "Dramatics, Dancing and Music." This section would be supervised by a Dramatics and Dancing Supervisor (R105A Code 3242) reporting directly to the Superintendent of Recreation. Under the Dramatics and Dancing Supervisor would be one Senior Recreation Leader (R58 Code 3286) to whom would be delegated responsibility to a proper extent. Note - The present Supervising Director (R58) in the Drama and Dance section is overclassified and this position should be reclassified as "Recreation Leader (R56 Code 3284)." The present Director of Music (R106C Code 3252) should be reclassified at a lower grade or eliminated as the recommended elimination of high-cost "educational" and "nursery school" programs will considerably reduce the work load.

3. Junior Museum: This section would be supervised by a Senior Curator, Junior Museum (R118 Code 3580) reporting directly to the Superintendent of Recreation. This position would combine the two present positions of Supervising Director (R58) and Curator (R118). He would be responsible for all activities of the Junior Museum, delegating responsibility to the Recreation Leaders (Code 3284) under him.

4. Photography Center: This section would be supervised by one Photography Director (R58 Code 3258) reporting directly to the Superintendent of Recreation. He will have complete supervision over the Center with one Photography Instructor (R56 Code 3256).

5. Special Program and Results: This section would be supervised by one Supervising Recreation Leader (R58 Code 3290) reporting directly to the Superintendent of Recreation, and who would supervise the following programs:

(a) Arts and crafts training.
(b) Assigning and regulating use of Park Areas by special groups and organizations.
(c) Day Camp Programs.
(d) Assigning overnight camping areas and supervising their use.
(e) Planning, equipping and furnishing new and existing installations and associated responsibilities.
(f) Supervision of Senior Citizens and Tiny Tots activities.
(g) Annual report and other interim reports.

Under this Supervising Recreation Leader would be 2 Senior Recreation Leaders (new classification Code 3286) and 1 Recreation Leader (R56 Code 3284) to whom he would delegate the responsibility for the programs enumerated above. The Recreation Leader (R56 Code 3284) should have assigned to him items (f) and (g) above and such other duties as the Supervising Recreation Director may assign.

6. Aquatics: This section would be supervised by one Aquatics Supervisor (R106D Code 3216) reporting directly to the Recreation Assistant Superintendent. This is the same organization set-up as at present.

7. District Recreation Units, #1, #2 and #3: It is recommended that the present four districts be combined into three districts to conform with Park Division Districts.

By developing compatible districts and organizations for both the Recreation and Park Divisions (see Park Division recommendations), it will enable the district supervisors of both divisions to co-ordinate their efforts and to reconcile the programs and objectives of two somewhat divergent schools of thought.

Each district Recreation Unit would be supervised by a Recreation Area Supervisor (R58 Code 3288) reporting directly to the Assistant Superintendent of Recreation. Each will be responsible for the recreation activities in his area, and the proper functioning of the Recreation Leaders (R56 Code 3284) on the ground.

It is further recommended that those large recreation units requiring three or more Recreation Leaders on duty at the same time, be staffed with a Senior Recreation Leader (new classification Code 3286) as one of the required staff. This person will have complete responsibility for the unit and will report directly to the Recreation Area Supervisor. At present there are 14 such units. The working supervisor at the installation level should reduce the amount of supervision needed at the unit level.

8. Golf Course Operation: This section would be supervised by a Golf Course Operations Supervisor (R20 Code 3228) reporting directly to the Recreation Assistant Superintendent. The duties of this person will be the same as at present except that direction of Coit Tower should be transferred to the Business Division. Balboa Stadium and the old Golden Gate Park Stadium may remain under supervision of this section.

(The above eight reorganization recommendations will result in a saving of $41,000 per annum in personal services.)

9. Recreation Field Units Personnel: (Recreation Leaders, etc.) By revising schedules at many units during Fall, Winter and Spring months, or 39 weeks of the year (excluding Summer vacation), a saving of 436 full-time director hours and 152 part-time director hours per week can be accomplished. This will equal an annual saving of $66,000.

Principally, these revisions involve rescheduling or discontinuing programs now being conducted during morning hours.

Supervisors Instruction Manual - Recreation

Written procedures and instructions as well as detailed job descriptions should be developed in the form of a manual for the supervisory personnel.

Lack of written procedures for various jobs or operations has caused inconvenience, misinformation, non-uniform practices by employees, and costly guesswork on how to do the job. They would be of tremendous assistance in training supervisors or personnel when they are appointed to a new position. Many times the previous incumbent has left the department employment, retired, or transferred to another position and is unable to assist in the training.

This division has prepared a "Recreation Directors Instruction Manual." which is of real assistance to the field forces.

Supervisors Instruction Manual - Aquatics

An instruction manual for the Aquatics Section personnel should be prepared. A manual similar to the "Recreation Director's Instruction Manual" should include all rules, regulations, and instructions about handling various types of situations, policy information, reports, etc.

Rotation of Personnel

A plan should be developed for management personnel, such as Supervising Directors (R58 or Codes 3280 and 3290), whereby they can be rotated between any of five positions.

1. Supervising Director in Athletics Section.
2. 3 Supervising Directors in Districts.
3. Supervising Director in assigning and regulating use of Park Areas.

This should:

1. Strengthen the department, as more than one person will know the details of the particular operation.

2. Strengthen and broaden the individuals in the overall departmental operation.

3. Provide cross-training, which will develop a better understanding and co-ordination of all activities.

4. Provide an incentive for individuals to improve themselves for future appointments.

In-Service Training Program

The training program for the Division should include:

1. Recreation leadership actually put into effect at a recreation unit or a playground under supervision of an experienced Recreation leader. This would include observation of program leadership techniques by new trainee employees.

2. On-the-grounds training of new recreation leaders in recreation skills, department operation procedures and safety practices before the individual is assigned to a recreation area.

3. A thorough indoctrination regarding Park Division goals and cooperation between divisions.

Such initial training should develop a stronger and better versed employee, who will produce more efficiently. In addition a public relations course should be developed for the new Senior Recreation Leaders.

Supervisory Verification List

A verification list for use by district supervising directors should be prepared. Such a list would include:

1. Recreation leaders' responsibilities.
2. Recreation leaders' objectives.
3. Sequence of recreation unit operation.
4. Recreation unit programs.
5. Attendance records at unit.
6. Other records, which must be kept by the unit director.
7. Supply requirements.
8. Safety practices relative to hazards.
9. Techniques.
10. Work plan .
11. Personnel rating chart aimed at performance improvement.
12. List of failures, if any.
13. Attitude and morale indications.
14. Public relation activities.
15. Condition of quarters and equipment.
16. Any other items, as necessary.

Each item should have a verification date assigned at logical intervals. The management supervision would use this as a guide for making supervisory checks, at regular intervals, to determine the type of job performance. In turn, the list should be reviewed by the Assistant Superintendent or the Superintendent. It can be an effective management tool.

Attendance Records

Reassign the "Tiny Tots" attendance recording to the stenographic pool. At present, this record takes the time of a staff member. All other unit attendance records are maintained by personnel in the stenographic pool.

Budget Suggestions

Review items in budget, which have been deferred or deleted due to lack of funds on an organized scheduled quarterly basis to determine:

1. Maintenance problems incurred.
2. Further deterioration of equipment or buildings.
3. Necessity of curtailing services.

Report serious conditions to the General Manager in order to assist in establishing project priorities for ensuing budget period.

Department and Recreation Division Publicity

A programmed study should be undertaken to evaluate the amount and type of departmental and Recreation Division publicity that is developed, prepared and distributed. A considerable amount of this written material should be discontinued. A saving in personnel time could be realized, as much time is spent by various supervisors in addition to the time spent by the staff supervisor delegated to handle publicity releases, pamphlets, etc.

Filing System

Generally, each supervisor keeps a master file on each matter which he handles. It is recommended a thorough review of the files and filing methods be made in order to consolidate files and arrange a uniform, neat, and orderly method, and a central file. This should save considerable time of supervisory personnel doing filing and save time in locating filed material.

In addition, a retention schedule should be developed for the orderly disposition of filed records. Such a plan would result in considerable saving of filing cabinet and file room space, and would assure destruction of obsolete records.

Long and Short Term Planning

A recommendation was made to the Superintendent and Assistant Superintendent of Recreation to introduce a calendar booklet for long and short term planning. The Division readily accepted the suggestion and put the plan into effect with all management supervisors.

The booklet is used to plan ahead by listing dates for meetings, projects, start and completion dates for various programs and activities affecting the individual and the entire division, follow-up dates for important verifications or checks to be made, etc. If utilized correctly, it presents a visual picture of each month's plans, which provides the supervisors a concrete organized method of planning their daily, weekly, monthly, quarterly, semi-annual and annual work.

Handling of Agreements and Reservations for Use of Special Recreational Facilities

The following special facilities are handled by one Supervising Recreation Leader (R58 Code 3290):

1. Dog Training Area
2. Horseman's Retreat (Bercut Equitation Ring)
3. Casting Pools (Anglers' Lodge)
4. Model Yacht Club
5. Wawona Club House
6. Sigmund Stern Grove Barbecue and Camping Area
7. Camping Facilities and Grounds:
   (a) 20 Golden Gate Park locations
   (b) Buena Vista Park
   (c) Balboa Park
   (d) Pine Lake Park
   (e) Silver Tree Camp (also Day Camp activities)
   (f) McLaren Park (being developed)

All requests for the use of these facilities are officially directed to the General Manager or the Superintendent of Recreation and are handled at one centralized location in the Recreation staff headquarters. Normally, clearance must be obtained from headquarters by any individual or group wishing to use these facilities. The same procedure is followed when a request is made to reserve a playground clubhouse, auditorium or meeting room. However, in these cases, the Recreation Area Supervisor involved investigates, clears, approves and notifies the individual or group involved.

A fee of $5.00 is charged, or an amount sufficient to cover the expense of a Recreation Leader opening the clubhouse and remaining in attendance until the group is finished with their meeting or program. This also includes Sigmund Stern Club House reservations. The exceptions to a fee are as follows:

> No payment applies to any bona fide Community Chest agency, Public or Parochial schools, Church or Playground groups, P.T.A. or similar non-profit organizations.

The fees and reservations are recorded by a supervisor at the Recreation headquarters. Very little revenue is derived from this source.

In addition, the supervisors in charge of the Junior Museum and the Recreation Arts buildings make reservations for public group meetings at these locations. No rental fees have been charged for these facilities.

The reservations for meeting or conference rooms at the Lake Merced Sports Center are handled by a matron at the building. A definite schedule of fees has been established and is being adhered to.

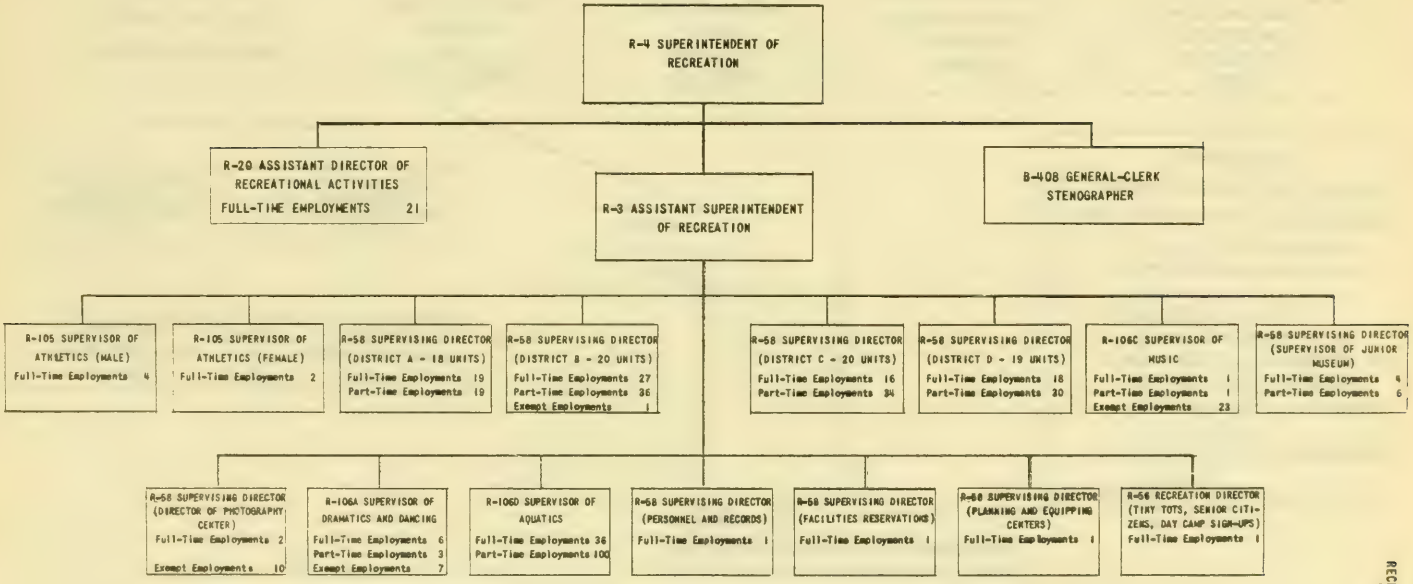
Specific Recommendations

1. Handle all reservations for any facility under the jurisdiction of the Superintendent of Recreation in one location at Recreation headquarters. The request should be investigated, cleared, approved or refused and notification sent to the party making the request. All reservation records should be kept and fees collected at Recreation headquarters. Closer and more complete supervision should be given to this subject.

Under the recommended reorganization plan, this operation need not be handled by the Supervising Recreation Leader exclusively. It could be assigned to one of the Senior Recreation Leaders assigned to him. At least three of the present staff should be trained in how to handle this procedure. This should decrease the amount of clerical work done by the Supervising Recreation Leader and provide vacation and absence time coverage.

2. Fees should be carefully reviewed and made comparable for all facilities. A definite fee schedule and method of procedure should be written, distributed to supervisors and followed closely.

CITY AND COUNTY OF SAN FRANCISCO
RECREATION AND PARK DEPARTMENT - RECREATION DIVISION
PRESENT ORGANIZATION



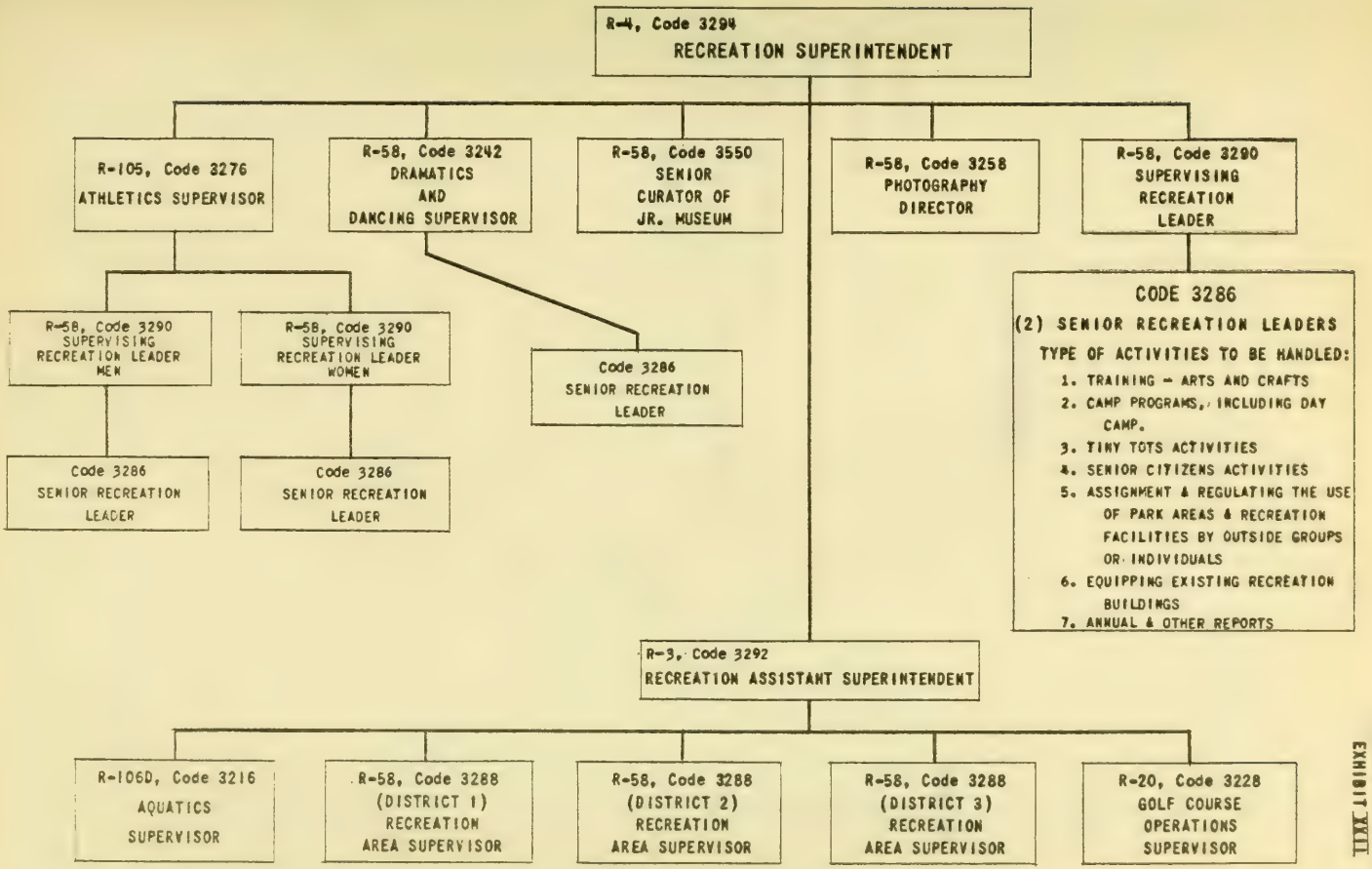
RECAPITULATION	
FULL-TIME EMPLOYMENTS	163
PART-TIME EMPLOYMENTS	229
EXEMPT EMPLOYMENTS	41
TOTAL	433

RECREATION & PARK
EXHIBIT XXI

DECEMBER, 1960

NOTE: Employments Figures Include Supervisor Of Unit.

PROPOSED ORGANIZATION



RECREATION & PARK
EXHIBIT XXII

MAY, 1961

VI

PARK DIVISION

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PARK DIVISION

Function

The responsibilities of the Park Division are: The design, development, redevelopment, and maintenance of landscaped areas on properties under the jurisdiction of the Recreation and Park Department and other Departments on a transfer of funds basis; construction and maintenance of structures, buildings, roads, paths, courts, playfields, and related equipment; construction, maintenance, and operation of irrigation and domestic water supply systems and water reclamation systems; operation and maintenance of nurseries and the Conservatory; design, construction, reconstruction, and maintenance of municipal golf courses; and development, operation, and maintenance of the Hall of Flowers and the Strybing Arboretum and Botanical Gardens.

Organization

The Park Division is under the direction of the Superintendent, Park Department. The Division is composed of ten sections as follows

1. Grounds: Responsible for horticultural development and maintenance and custodial services in approximately 100 parks, squares, playgrounds, and assigned library branches, and the War Memorial Opera House in San Francisco and Camp Mather in Tuolumne County. The division of geographically dispersed units throughout San Francisco is provided by four Buildings and Grounds Supervisors.

2. Maintenance: Responsible for horticultural development and maintenance and custodial services in Golden Gate Park and the Panhandle, San Francisco Zoological Gardens, Storyland, Great Highway and Ocean Beach, Sutro Heights Park, Mountain Lake Park, and Park Presidio Parkway; horticultural development and maintenance at the North Point Sewage Treatment Plant and provision of tree topping, powered insecticide and weed control spraying, and rodent control services to other units in the Department.

3. Conservatory: Responsible for propagation, or transplanting, and maintenance of permanent specimens on display and the planning, propagation, and exhibition of temporary floral exhibits in the Conservatory in Golden Gate Park; and conducting group tours through the Conservatory.

4. Nurseries: Responsible for propagation and development of shrubs, trees, and other planting stock for locations under the jurisdiction of the Recreation and Park Department; maintenance of flowering shrubs periodically displayed in Union Square and other locations; and propagation, development, cutting, and delivery of floral arrangements for various City offices.

5. Golf Course Maintenance: Responsible for planning, construction, reconstruction, and maintenance of four municipal golf courses in San Francisco, and one course at Sharp Park in San Mateo County.

6. Strybing Arboretum and Botanical Gardens, Hall of Flowers: Responsible for planting, development, maintenance, classification, and labeling of specimens in the Arboretum and Botanical Gardens; conducting group tours through the Arboretum and Botanical Gardens; and operation of the Hall of Flowers as a meeting place for garden and flower clubs, civic groups, commercial groups, and flower shows. (The Hall of Flowers was constructed with State funds and a portion of annual operating costs are obtained from State funds on the basis that an annual flower show held in the fall months is, in effect, a County Fair.)

7. Building Maintenance: Responsible for inspection of buildings and structures under jurisdiction of the Department to determine need for major reconstruction or maintenance work; prepares cost estimates for such work and a justification explanation for projects to be submitted as part of the annual budget; preparation of specifications for purchase of building materials, supplies, and equipment; maintenance and repair work on buildings, structures, and equipment as provided for in the annual budget for major projects, or as requisitioned by Department personnel for minor repairs; and the provision of watchmen for specific locations.

8. Construction of Roads and Paths: Responsible for the construction, reconstruction, and maintenance of roads, paths, and paved areas on Recreation and Park properties, except major thoroughfares handled by the Department of Public Works; provision of equipment and operators for hauling of materials and cuttings, road or land grading, bulldozing, power mowing of large grass or meadow areas, and hauling of garbage for locations not handled by scavenger service; operation of Land's End - Lincoln Park dump; and preparation of budget estimates and justifications and purchasing specifications for automobiles, trucks, and other motorized equipment.

9. Operating Engineer: Responsible for operation of, or prescribing operating procedures for, pumping, heating, ventilating, and refrigerating equipment; operation of chlorinating, filtering, and purification of water for swimming pool installations; preventative maintenance programs for mechanical, electrical and auxiliary machinery and equipment; and preparation of budget estimates and justifications and purchasing specifications for equipment, supplies, installation, and repair of pumping, heating, ventilating, refrigerating, chlorinating and filtering machinery and equipment.

10. Water Reclamation Plant-Chemical and Bacteriological Analysis: Responsible for operation and maintenance of water reclamation plant in Golden Gate Park which supplies water to the Park's irrigation system; operation of Lloyd Lake and Elk Lake pumping stations and 20th and Lincoln sand trap; and performance of chemical analysis and bacteriological services for other Park Division units for plant control in lakes and ponds, control of boiler and swimming pool water, soil analysis, construction material testing, water quality control in lakes and reservoirs, and mosquito and gnat control.

Staffing

The 559 positions in this Division are distributed among the ten sections as shown on an organization chart included as Exhibit XXIII.

Specific Recommendations

Organization

1. Reassign territory assignments of the current four Supervisors, Buildings and Grounds (proposed title: Area Supervisor: Parks, Squares, and Facilities) to eliminate overlapping geographic territories and reduce travel. Suggested assignments:

a. U.S. Bureau of Census districts A, B and J. (See map included as Exhibit I.)

b. U.S. Bureau of Census districts C, D, E, F, G, H, O, P, and Q.

c. U.S. Bureau of Census districts K, L, M, N.

Work with Recreation Division toward goal of having territories of Area Supervisors: Parks, Squares, and Facilities coincide with those of the three Recreation Area Supervisors. This arrangement will reduce coordination problem which currently exists in having dissimilar geographic territories.

The suggested arrangement would permit reduction of one Supervisor of Buildings and Grounds position in the Park Division.

2. Transfer labor crew working on construction and reconstruction of athletic fields to proposed Assistant Superintendent (Structural Maintenance and Services) as this unit provides various craft labor services to all Recreation and Park locations.

3. Transfer supervision of Golden Gate Park Nursery and the Conservatory to the Supervisor, Maintenance (proposed title: Assistant Superintendent-Large Parks). The Nursery and the Conservatory are physically located in Golden Gate Park, the horticultural development and maintenance of which is assigned to the Supervisor, Maintenance.

4. Transfer the tree topping, insecticide spray, and rodent control services presently under the Supervisor, Maintenance, to the Assistant Superintendent (Structural Maintenance and Services) for same reason outlined in paragraph "2".

5. Transfer the activities under the present Supervisor of Construction, Roads and Paths; Chief Operating Engineer and Chemist, Sewage Treatment Plant to the Assistant Superintendent (Structural Maintenance and Services). Again, this organizational arrangement will put into one component the service activities relating to maintenance and repair of all facilities within the Department.

Institute a program for establishment of work measurement standards for gardening and custodial activities. These activities are represented by approximately 375 positions in the Park Division and $2,750,000 in labor costs, including fringe benefits. Industrial applications of various work measurement techniques anticipate a minimum savings of 15% in labor costs. Such a savings in this situation would equal $412,500 per year.

Develop plans for new landscaping, or for replacement landscaping, to reduce continuing maintenance to a minimum. For example, the perimeter planting of several playgrounds includes cypress trees which are pruned and trimmed in a manner befitting a formal garden. In other cases, areas are planted and replanted when the obvious traffic patterns preclude maintaining lawn or plant growth.

Adopt the planning calendar for supervisory planning recommended in the Recreation Division section of this report and adopted by that Division. This calendar should be useful in establishing and programming short- and long-range objectives, target completion dates, and follow up on personnel evaluations and other actions.

Develop and use a check list or audit sheet for systematic and periodic (recommend semi-annual) inspection of facilities and work performance at each installation under the jurisdiction of the Park Division. An excellent example is included in "Park Maintenance", a manual published by the State of California Recreation Commission.

Cut Flower Production (Balboa Park Nursery)

This Operation provides cut flowers for numerous city offices, and for special events such as receptions at City Hall, commemorative observances, dedications of public buildings, civic banquets, recreational activities, etc. Flowers are delivered weekly to:

1. Mayor's office
2. Supervisors' office and meeting room
3. Miscellaneous City Hall offices:
   Chief Administrative Officer, Civil Service Commission, Controller, Department of Public Works, Marriage License Bureau, Public Utilities, Sheriff and Undersheriff, Retirement Board
4. McLaren Lodge offices and Hall of Flowers
5. Five members of the Recreation and Park Commission.

In Addition, during the concert season at Stern Grove, 100 to 150 bunches of flowers are delivered for each of about 12 concerts. Also, when flowers are plentiful, the extra supply is given to the nurses' quarters at the San Francisco General Hospital and to the Auxiliary of the Laguna Honda Home. Special events in 1960 covered such things as a doll show at the Sharon Building, Lincoln memorial services at the City Hall, dedication of the Civic Center Garage, two receptions for President de Gaulle, reception for Mr. and Mrs. Avery Brundage at the City Hall, dedication of the Hall of Flowers, and many others.

The operation is staffed by a Foreman Gardener and four Gardeners. Approximately 63.5% of this labor is chargeable to the cut flower operation; the balance of 36.5% being chargeable to the production of shrubs; the warehousing of fertilizer, grass seed and grain, for general Department requirements; and maintenance of grounds. Applying the factor of .635 to the budget request for 1961-62 gives the following amounts chargeable to cut flowers:

Personal services (including holidays and overtime)	$ 24,061
Retirement and Federal Insurance Contributions Act Taxes	3,164
Total Labor	$ 27,225
Maintenance and Repair	2,040
Utilities	650
Materials and Supplies	2,800
Total annual cost	$ 32,715

On the basis that requirements for flowers for 1961-62 will be approximately the same as in 1960, the regularly scheduled deliveries plus special events will account for about 75% of the flowers produced and delivered. The remaining 25% represents excess production delivered to the hospitals. The total cost of production and delivery should be charged to the regularly scheduled deliveries, which means that this service will cost the city:

For production of cut flowers	$ 33,715
For transportation and labor for placing and arranging	2,550
Total annual cost	$ 36,265

The Department has made estimates of the cost of a contracted service. Based on the 1960 deliveries (excluding surplus to hospitals) the estimated contract cost is $12,765, roughly one-third of the cost of the city-grown flowers. (To this must be added about $2,700 to cover estimated contract cost for certain items provided by the Conservatory, and for which no cost figures are available. This would bring the total estimated contract cost to about $15,500. Undoubtedly, the city cost figures above would be increased more than in proportion if costs for the Conservatory items were included.)

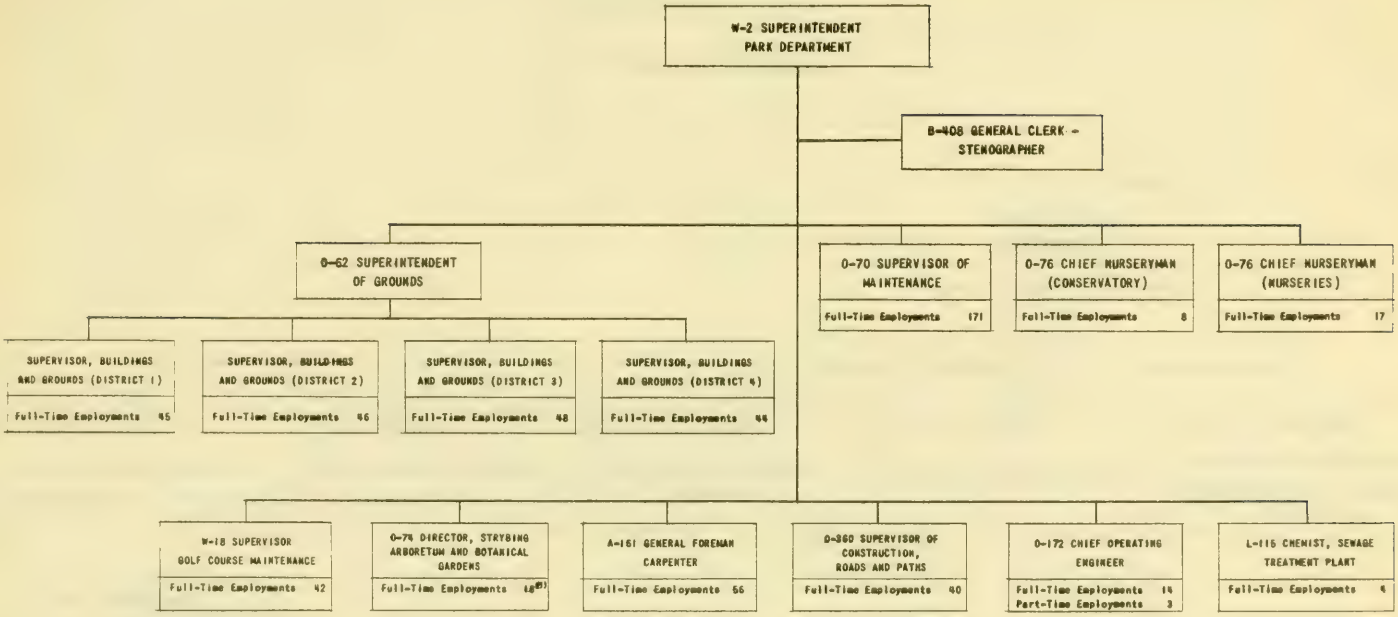
This subject of cut flowers is brought into sharper focus because the present greenhouses and growing fields at Balboa Park will soon be taken over by the State Highway Department for a new Freeway. Tentative plans call for a relocation of this activity at a new site in McLaren Park. A rough estimate made by the Department indicates that the cost of construction of greenhouses and auxiliary buildings at the new site would be approximately $170,000. This would cover the erection of greenhouses of considerably greater size than those now used at Balboa Park.

Specific Recommendations

1. In view of the apparent great discrepancy between the cost to the city of growing its own cut flowers and purchasing them on a contract basis, terminating this activity when the area now occupied in Balboa Park is taken by the State, is recommended.

2. Further economies could undoubtedly be made by a positive reappraisal of the need for weekly delivery of flowers to [illegible] Filmore. It should be noted that on the estimated contract basis, such deliveries would account for approximately $9,000 per year, or approximately 5% of the total estimated contract cost of about $15,500 per year.

CITY AND COUNTY OF SAN FRANCISCO
RECREATION AND PARK DIVISION - PARK DIVISION
PRESENT ORGANIZATION



RECAPITULATION	
FULL-TIME EMPLOYMENTS	556
PART-TIME EMPLOYMENTS	3
TOTAL	559

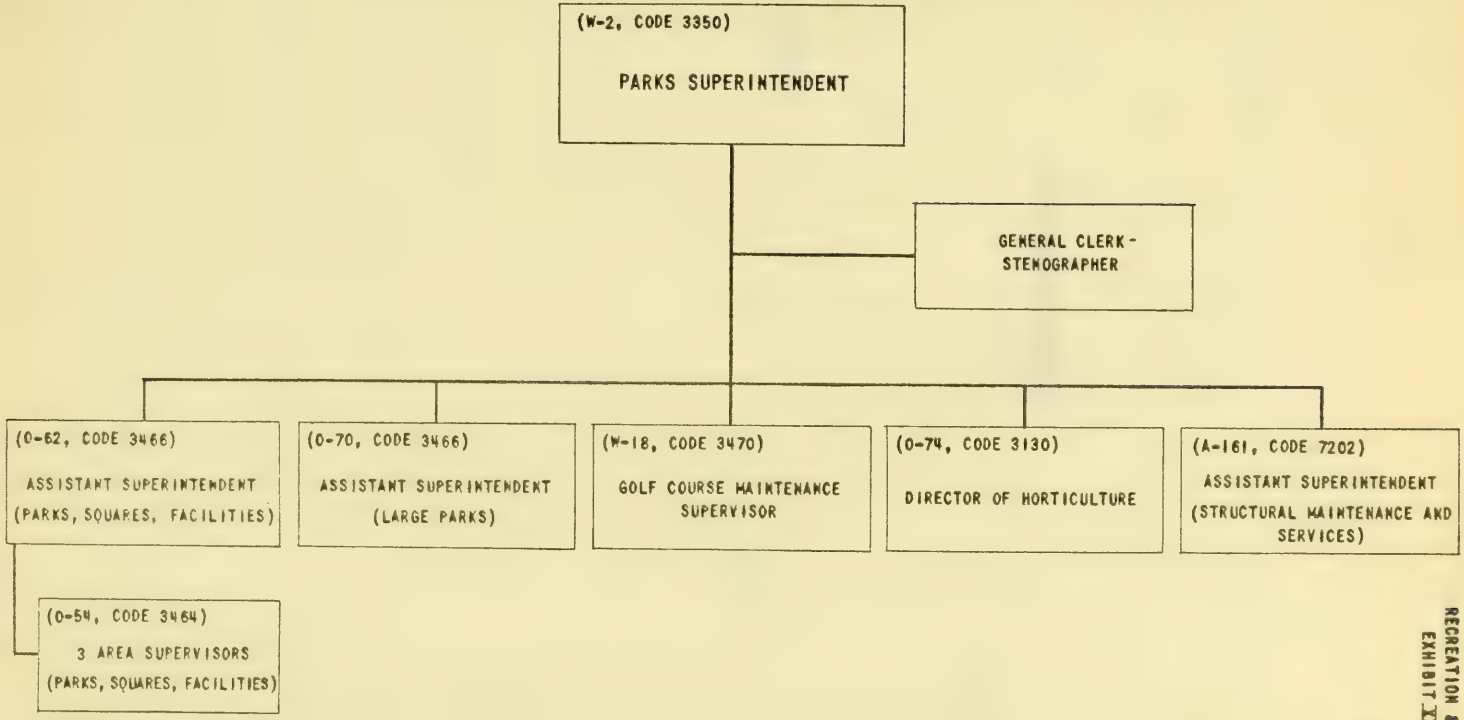
(1) 6 1/3 Employments Paid From State Funds.

NOTE: Employments Figures Include Supervisors Of Units.

DECEMBER, 1960

RECREATION & PARK
EXHIBIT XXXII

CITY AND COUNTY OF SAN FRANCISCO
RECREATION AND PARK DEPARTMENT - PARK DIVISION
PROPOSED ORGANIZATION



RECREATION & PARK
EXHIBIT XXIV

MAY 1961

VII

ENGINEERING DIVISION

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ENGINEERING DIVISION

Function

The Engineering Division performs, or arranges for contract, professional engineering and architectural work for the Department. This includes:

1. Collaborating on the establishment of engineering policies and programs in connection with construction, rehabilitation, and major maintenance projects to be included in the annual budget.

2. Assists in estimating costs for projects to be included in the budget, including engineering and architectural costs if project is to be contracted or performed by bond projects personnel.

3. Prepares plans, designs, and construction drawings and specifications for projects approved and included in the annual Appropriation Ordinance; arranges for such work to be performed by contract engineers and architects, when performance is by outside firms.

4. Advertises for bids, analyzes bids after they are opened, and makes recommendations regarding award of contract.

5. Determines that contractor to whom contract is awarded has posted required performance bond and is properly insured after the Recreation and Park Commission has accepted bids and awarded contract, the contract has been approved by the City Attorney, and certified by the Controller.

6. Inspects work performed by contractors, certifies progress and final payments, and arranges for contract modifications as may be necessary during construction.

7. Makes topographic surveys as necessary for major project planning.

8. Formulates basic landscaping plans for major projects including all aspects of the use of land and preparation of preliminary sketches of landscaping plans.

9. Maintains ledgers accounting for Recreation and Park bond fund encumbrances and expenditures.

10. Processes contract payments to contractors, architects, engineers, and testing laboratories.

Staffing

The authorized staff for the Engineering Division was as follows:

F-430	Supervising Engineer	1
F-406A	Assistant Engineer II	3
F-404A	Assistant Engineer I	5
F-401A	Junior Engineer	3
F-122	Senior Architectural Draftsman	1
F-110	Landscape Architect	1
F-610	Chief of Party (Survey)	1
F-102A	Draftsman	2
B-6	Accountant II	1
B-512	General Clerk-Typist	1
B-2	Account Clerk	1
	Total	20

Interim Transfer

During the course of this study, in February, 1961, the Engineering Division was transferred to the Department of Public Works after the State Legislature ratified voter approval of this action in November, 1960. Due to this transfer the Recreation and Park Task Force discontinued further consideration of the Engineering Division.

VIII

ZOO DIVISION

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ZOO DIVISION

Function

The Zoo Division is responsible for the care and feeding of animals, maintenance of their health, and their display at the San Francisco Zoological Gardens (Fleishhacker Zoo), the Buffalo Paddock in Golden Gate Park, and the animal farm at Children's Playground which is also in Golden Gate Park. The Zoo Division is also responsible for animals included in special displays, such as the sheep in the Christmas scene arranged annually in a meadow area in Golden Gate Park. The Director of the Zoo makes recommendations relative to acquisition, disposition or exchange of animals and birds.

Staffing

Manpower in the Zoo Division consists of the following:

1	W-212	Director of Zoo
1	W-210	Head Animal Keeper
1	W-208	Assistant Head Animal Keeper
28	W-206	Animal Keeper
31		Total

The Park Division provides grounds and building maintenance and janitorial personnel for the Zoo, Fleishhacker Pool, Fleishhacker Playground, and Storyland, which are all in the same area. The personnel involved total 22.

Attendance

The annual attendance at the San Francisco Zoological Gardens has been estimated at 1,500,000. The attraction of this facility to tourists is evidenced by a sampling of visitors conducted by the San Francisco Zoological Society on several days throughout the summer of 1959. The results showed the following distribution of origin of visitors:

San Francisco	25%
Bay Area other than San Francisco	37%
Balance of California	25%
Balance of U. S.	12%
Foreign	1%
Total	100%

Concessions

The San Francisco Zoological Society has concessions for rides at Fleishhacker Playfield and audio devices, gift shop, cafeteria, food booths, and seal feeding at the Zoo. San Francisco Zoo Tours, Inc. has the concession for sightseeing tours of the Zoo. In addition to a concession fee, the surplus of receipts over expenses for the San Francisco Zoological Society are used to purchase equipment for maintenance of the Zoo and for donations to the city for capital improvements or purchase and exchange of animals.

Specific Recommendations

Refer to recommendation on fees and admission charges in another section of this report.

IX

ADMISSIONS AND FEES

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ADMISSION AND FEES FOR RECREATION ACTIVITIES AND FACILITIES

General

Self-support through fees and charges in recreation is now an established and publicly accepted fact. Since local government is often competing with private recreation agencies, the public mind is partially geared to a fee system for public recreation. It is the present and future obligation of the people in this profession to be certain that the monies obtained in this manner are justified, equitable, levied on a sound basis and wisely used. Activities for children should be free of unnecessary charge, while adult programs should be self-supporting. This was the general concensus of a Committee assigned to this subject at the 12th annual California and Pacific Southwest Recreation Conference held at San Jose in February 1960.

NOTE: The Committee membership was composed of the following: South Gate Director of Parks and Recreation, Chairman; Oakland Superintendent of Recreation; Chula Vista Director of Recreation; Santa Fe Springs Recreation Supervisor; and Huntington Park Director of Recreation.

This committee held the opinion that financial responsibility for facilities and programs designated as indispensable or essential should be provided by the agency, while those evaluated as desirable should be self-supporting. Their feeling was -- "It is the responsibility of the community to provide the bread -- the butter and jelly must come from those who eat".

An opinion, generally accepted by the Committee was that fees should not deter participation of underprivileged individuals or groups. Scholarships or booster organizations can be a means of providing for those who cannot pay.

The concensus of many in the recreation field is that monies derived from fees and charges should not become a part of a central or general fund, but should be ear-marked in some fashion by the Controller so as to be used to supplement inadequacies of capital assets or to provide for participation of under-privileged. This is recommended in Section I of this report.

Specific charges should relate to specific costs determined by sound and business-like methods. The recreation profession must accept this fact if it is to survive and improve its status. As budgets rise, so also does the amount of public scrutiny. Recreation is a business and must accept the responsibility of adequate justification. More and more thought and positive action must be given by recreation management toward fees and charges to supplement established income from ad-valorem taxes. A definite written policy and plan, established on a concrete basis, is an absolute necessity.

Specific Recommendations

1. The following principles should be observed in establishing a schedule of admissions and fees:-

   (a) Financial support should be provided by those participating in high-unit cost programs.

   (b) Financial support should be provided by those participating in programs requiring specialized leadership or individual or small group instruction.

   (c) The ad valorem taxpayer should, in general, support only programs with mass appeal requiring little or no specialized leadership, no individual or small group instruction, and those with low unit costs.

   (d) Adult programs should be established only when adult participants are willing to fully defray the cost.

   (e) Non-residents of San Francisco should support proportionately those mass appeal activities which attract a substantial attendance from that group.

2. The objectives to be sought are:

   (a) To set charges no higher than necessary to recover out-of-pocket costs.

   (b) To generally provide services and programs free to children under 12 or 14 years of age.

   (c) To deter undesirable use of recreation facilities.

   (d) To regulate and control use of facilities, equipment, and supplies.

3. A definite written policy and schedule of admissions and fees is an absolute necessity to accomplish the desired result.

The Summary which follows summarizes the operations which are the subject of detailed reports included in this Section and includes all revenue generated by the Recreation and Park Department. No capital costs have been included in the Summary tabulation nor in the detailed reports. Also, costs do not include payroll fringe benefit costs, estimated to total $100,000 nor overhead expenses of heat, light, water, etc. Specific recommendations pertaining to each activity are also included in the detailed reports.

RECREATION AND PARK DEPARTMENT
ADMISSIONS AND FEES FOR RECREATION ACTIVITIES AND FACILITIES
SUMMARY OF DETAILED REPORTS

	Activity	(Col. a) Participants or Attendance	(Col. b) Estimated Cost - 1960 - 1961 Wages	(Col. c) Other	(Col. d) Total	(Col. e) Estimated Revenue 1960-61	(Col. f) Net Income or(Deficit) Col. d - e	(Col. g) Cost per Participant Col f + a
1.	Tiny Tots	1,686	$ 26,573	$ 250	$ 26,823	$ -	$ (26,823)	$15.91
2.	Senior Citizens	380	4,676	-	4,676	-	(4,676)	12.50
3.	Summer Day Camps	2,440	10,965	3,612	14,577	4,800	(9,777)	4.00
4.	Photography	851(1)	33,395	1,800	35,195	6,300	(28,895)	33.70(1)
5.	Drama and Dance	9,679	50,389	3,000	53,389	-	(53,389)	5.50
6.	Music	2,535	31,158	-	31,158	-	(31,158)	12.29
7.	Junior Museum (evenings only)	1,080	2,165	-	2,165	-	(2,165)	2.00
8.	Swim Pool Activities	644,700	$ 315,460	-	$ 315,460	$ 89,000	$ (226,460)	
	(a) Lake Merced Central Clubhouse		(3)	-	(3)	1,020	1,020	
	(b) Fleishhacker Bath House		(3)	-	(3)	9,700	9,700	
	Total Swimming		$ 315,460	-	$ 315,460	$ 99,720	$ (215,740)	$ 0.21(2)
9.	Industrial Division	2,153	$ 6,856(4)	-	$ 6,856	-	$ (6,856)	$127.00(5)
10.	Softball Association							
11.	Tennis (G.G. Park)	123,789*	9,514	-	9,514	2,100	(7,414)	
12.	Camp Mather	3,549	43,330	66,228	109,558	134,670	25,112	
13.	Coit Tower	426,500	17,075	5,897	22,972	32,500	9,528	
14.	Golf Operations	375,805	471,435	10,911	482,346	486,470(6)	4,124	
15.	Stadia							
	(a) Balboa Stadium	41,500*	$ (7)	$	$ (7)	$ 2,500	$ 2,500	
	(b) G.G. Park "	15,000	5,061	5,204	10,265	230	(10,035)	
	(c) Kezar Stadium and)	560,000	48,773	54,441	103,214	175,000	89,786	
	" Pavilion)	56,600				18,000		
	Total Stadia	673,100	$ 53,834	$ 59,645(8)	$ 113,479	$ 195,730	$ 82,251	
16.	Model Yacht Club	67	$ -	$ -	$ -	$ -	$ -	
17.	Anglers Lodge	290	-	-	-	-	-	
18.	Zoo Operations	1,500,000(Est)(9)	300,300	150,900	451,200	-	(451,200)	$ 0.30
19.	Storyland	307,000(Est)	50,240	1,275	51,515	41,000(10)	(10,515)	
20.	Rifle Range (Sharp)	11,762*	2,988	-	2,988	4,200	(1,212)	
21.	Archery (Sharp)	38,850*	-	-	-	-	-	
22.	Beach Chalet	-	-	-	-	600	600	
23.	(a) Yacht Harbor - Fees	257	21,900	10,400	32,300	42,000	9,700	
	(b) " " - Rent (St. Francis Yacht Club)	-	-	-	-	600	600	
	TOTAL		$1,452,253	$313,918	$1,766,171	$1,050,690	$ (715,481)	

Summary of Detailed Reports (Continued)

Total admissions and fees forwarded	$1,050,690
Revenues from Concessions	
Storyland Concessions	$ 2,300
Tea Garden	17,000
St. Marys Square Garage	15,950
Union Square Garage	5,000
Aquatic Park Concession	10,500
Lake Merced Boat Concession and Fish Permit	5,000
Miscellaneous Concessions	32,000
Fleishhacker - both Rides and Food	80,000
Fleishhacker Zoo - Cafe	16,500
Childrens' Quarters - Rides	12,500
Childrens' Quarters - Food	50,000
Harding Park Cafe	7,800
Lincoln Park Cafe	2,600
Sharp Park Cafe	5,600
Other Food Sales (Kezar, etc.)	40,000
Total Concession Revenue	$ 302,750
Grand Total Estimated Revenue	$1,353,440

* "Attendance units."
(1) Dues paying members.
(2) Not including 166,366 swims provided free for High School Physical Education programs.
(3) Included in figures on line 2.
(4) Based on pro-rata of Director's time devoted to this activity.
(5) Pro-rata cost per employer.
(6) Based on 1957-60 actual revenue
(7) Not obtainable - included in totals for Balboa Park.
(8) Of which [illegible] is for repairs
(9) [illegible]
(10) [illegible]

1. -- Tiny Tots Program

The "Tiny Tots" program represents an extension of the public schools kindergarten classes to children from 3 years to 4 years 9 months of age, an age when the child should be in the home. This activity closely resembles a nursery school. There is considerable feeling even within the Department that 2 years 9 months of kindergarten results in a restless and hard to control child during the kindergarten year in the public schools.

This program costs the Department $26,823 annually, or $15.91 per child, a very high cost. It operates 39 weeks per year, being suspended during the school vacation period. It requires the attention of 46 playground directors for a minimum of 2-1/2 hours for each class during morning hours when the clubhouse would otherwise be closed. As a result these full-time directors are able to complete 40 hours in 5 days, whereas otherwise it would require 6 days. This fact may have influenced the decision to institute this program some 7 years ago.

There are 80 groups meeting once a week with 5 more projected, the total attendance being 1,685, or about 8%, of approximately 20,500 children of this age group in San Francisco.

This is not a true "recreation" program but is more nearly an educational program, designed to teach the pre-school age child over a year and nine months substantially the things which the child will be taught in kindergarten in one year. We hear throughout the field that its real result is to allow the parent free time to "visit the neighbor over a cup of coffee" or "to go shopping".

Specific Recommendations

(a) These classes should be moved to an afternoon period which will remove the necessity of morning supervision.

(b) Because of its high cost and lack of pure recreation character this program should be self-supporting. Based on an attendance of 20 children per class in each of 81 classes, the fee schedule would be $8.00 per semester, $16.00 per year for each child. A decrease in attendance would not decrease the cost of the program as the expense is entirely supervisory. This would necessitate an upward revision of the fee schedule. Otherwise the program should be discontinued.

2. -- Senior Citizens Program

Social recreation indoor areas and programs are provided for some 15 groups of Senior Citizens composed of approximately 700 of the estimated 140,000 population in this age group (60 years and over). The programs include such activities as hobby arts and crafts, music, table games (cards, chess, checkers, etc.), folk and square dancing, luncheon teas, dinners, conversation, and informal visiting.

Thirteen recreation directors at recreation units plus one director on the headquarters' staff spend a total of approximately 34 hours per week, or an estimated 1,767 hours for 39 weeks at a nine months departmental expense $4,676.00. This expense is $12.50 per participant for a nine months' period or approximately $1.40 per month.

Only 25% to 30% of a Senior group's activity time is supervised by a recreation director. Each group does a considerable amount of their own planning and work. Most groups indicate this is the way they wish it to be, as they prefer to be as self-sufficient as possible. No recreation director assistance is given to the group meeting at the Yerba Buena Senior Citizens Building or to the men who meet daily at Funston and Rolph Playgrounds.

An annual Senior Citizens Hobby Show is conducted at the Emporium under the Sponsorship of the Chamber of Commerce, Labor Council, Emporium, Adult Education Division of the School District and others. Recreation and Park provides supervision by a Recreation Director, programs, ornate certificates of participation, ribbons for prizes, badges, etc. A Recreation Director spends considerable time in receiving and returning exhibits preceding and following the show. There were 207 exhibitors in 1960 and an attendance of 5,225. Only about 10 to 15 per cent were connected with Recreation and Park programs at recreation centers, the remainder coming mainly from about 30 otherwise sponsored groups. 47 were not affiliated with any group.

Specific Recommendations:

(a) As most of these folks are pensioners with limited income and they generally wish to handle their own activities and programs, no change or charge is recommended. It is further suggested that any of these groups be allowed to use available rooms or recreation buildings during day or evening hours when the facilities are normally covered by recreation personnel. A minimum amount of director supervision should be provided, as most of these folks seem to prefer to program their own activities and time. They like to have their own responsibility to do for themselves rather than be pressed into specified programs. The Recreation Division's approach should be one of cooperation rather than supervision.

(b) The Senior Citizens Hobby Show should be fully supported by the sponsoring groups and the clubs in which 85 to 90% of the participants hold membership.

3. Summer Day Camps:

The attendance at the 1960 Summer Day Camp Program was as follows:

Camp	Age Group	No. of Weeks	No. of Youngsters Per Week (5 Days)	Total Youngsters
Silver Tree	7 to 12	11	185	2,035
Pine Lake	11 to 13	9	45	405
		Grand Total		2,440

The Municipal Railway provides round trip transportation from designated recreation areas and school yards. In addition the following attended from other groups:

Outside Group	No. of Weeks	No. Per Week	*Total Youngsters
Aid to Retarded Children	8	5	40
Child Care Centers	9	20	180
St. Joseph Academy	2	20	40

* Included in Grand Total Above.

These camps are operated five days each week during the school summer vacation and provide a wholesome opportunity for outdoor living. Each child attends for one week only. The supervised program includes camp craft, nature lore, hiking, music, general crafts, camp fire programs, tours and field trips. Each child is furnished a noonday meal.

The expenditures of $14,577 in 1960 cover the wages of 11 full-time and 8.5 part-time personnel during the season, as well as transportation, food and materials. Payment of $2.00 per week for each child produced a total revenue of $4,800 in 1960. Thus the net cost to the department was $9,777 or $4.00 per child.

No immediate expansion is contemplated except possible increased attendance when the new Silver Tree Camp building is completed in the Summer of 1961. This year it is planned to operate Pine Lake Camp as in the past. Increased attendance will depend upon availability of personnel.

Specific Recommendations

Increase the fee to at least $4.00 per week per child, or 80¢ a day. At present cost figures this would cover approximately two-thirds of the expense. The City and County would still be subsidizing one-third of the cost.

This is another case where parents should pay for the service rendered.

The expense factor in this program seems to be all important. It is evident that this program could expand in the next five years if satisfactory financing could be arranged.

4. -- Photography

The Photography Center is an example of a high cost, proportionately low attendance activity producing relatively little income. It is housed in about 7,800 sq. ft. of the Recreation Arts Building at 50 Scott Street and is equipped with a huge dark room, 30 Omega enlargers, 6 contact printers, paper cutters and developing trays, a print room equipped with the latest type rotary print washers and dryers, a negative developing room, a studio equipped with the latest lighting equipment, locker rooms, library and large meeting room for lectures and club meetings. Use of the equipment is limited to those who have taken out memberships in the Center. The membership fee is nominal and the impression is conveyed that it is designed to insure continued attendance and perhaps weed out undesirables.

A staff of 13 operate the Center: 1 Supervising Director, 1 Recreation Director full-time, and 11 Recreation Directors all part-time, exempt. Also two-thirds of a janitor's time is required.

The following Camera Clubs use the Center for their meetings at no cost.

Northern California Council of Camera Clubs composed of delegates from 21 clubs in the Bay Area	1 per month
California Camers Club	4 " "
Sunset Camera Club	4 " "
Photochrome Club of San Francisco	2 " "
Thursday Night Camera Club	2 " "
Westwood Movie Club	1 " "
Special Activities Committee: consists of representatives of various clubs and Center members	2 " "

The Special Activities Committee provides special programs for which they make a charge. These consist of lectures (illustrated) on various facets of photography.

These meetings and programs attract an appreciable number from the surrounding Bay Area.

The staff gives frequent short "quickie courses" on various rather basic principles of photography, beamed at beginners, who are encouraged to become members of one of the clubs who meet at the Center. No charge is made for these courses.

The 1960 annual report of the Recreation and Park department concerning the Photography Division is misleading. In one paragraph it says that "During the year 46,730 people made use of the Photography Center's facilities" and in the next paragraph "the total active membership for the year was 1,508".

Actually, as of March 30, 1961 the membership was as follows:

676 holding currently valid membership cards.
181 memberships paid for but cards not yet picked up.
857 Total paid up members.

As no delinquencies are collected, this is the actual number of persons entitled to use the facilities and are the only ones currently providing financial support to the center. They represent just over 0.1% of the population.

In addition they carry in the live membership file:

553 who were delinquent up to 6 months. If any should renew their membership (and some will) no charge will be made for the period of delinquency and
1,254 who are delinquent from 6 months to 1 year, none of whom will be charged for the delinquency period, should they renew.

Of the 181 cards not picked up (indicating that the person has not visited the Center since taking out membership) 49 are annual memberships and by far the most of the remainder are 3 months memberships.

Of these cards	29	will	expire in	April	(1 month)
	34	"	" "	May	(2 months)
	46	"	" "	June	(3 months)
	6	"	" "	August to December	(5 months)
	46	"	" "	January to March 1962	(9 mos. to 1 year)

The 1960 annual report also states that since the opening of the facility in fiscal 1958 they "have had a total membership of 4,500". Here again is an overstatement, for this is the number of cash receipts issued. Thus, a person maintaining membership and paying quarterly would be counted about 12 times in this figure.

The annual cost of operating this activity is $35,195 for salaries and materials alone. The only income is from locker rental and dues of Center members, which in 1960 fiscal year was $5,878, leaving a deficit of $29,317. For fiscal 1961 the deficit is estimated to be $28,900. This is an annual cost of $33.70 per person. No attempt has been made to increase revenue, notwithstanding the fact that the programs presented by the Special Activities Committee, for which a charge of $4.00 or $5.00 is made, attract substantially greater attendance than the free courses.

The money derived from activities of the Special Activities Committee is said to be about $2,500 per annum and is retained by them for the purpose of defraying lecturers' fees and prizes; the remainder is used to buy articles for the Center, which the Supervising Director believes would be very difficult to get through regular budgetary procedures.

The objective of the Photographic Center is said to be to encourage a greater use of this activity as a "full-time hobby" instead of an occasional pastime. This would of course increase the cost of materials to the individual.

Photography is a recreational avocation requiring a comparatively substantial investment in equipment and a constant expense for materials, and is therefore to a very great extent an activity of those at least in moderately good income status. Attracting just over 0.1% of the population, it must be classed as being in the category of merely desirable but by no means essential for the health and welfare of the community. As a matter of fact, San Francisco's installation is the only one of its kind in the country, although several cities are exploring the desirability of installing some form of photography center.

Specific Recommendations

(a) The Center should produce income as near as possible to offsetting the expense of wages and materials. It is of such high cost that charges for repair and maintenance of equipment cannot be covered by dues. The following table sets forth the present and recommended fee schedule: -

	Present Annual Rate	Present Annual Income	Recommended Rate	Estimated Income
Membership in Center - Adult	$6	$4,896	$30	$23,268
Under 19	$2		$12	
Rental of Lockers	$4 to 12	892	$8 to 24	1,784
Rental of meeting room, including meetings of Special Activities Comm.	none	-	$20	4,320
Lecture courses (quickie) given by Center personnel	none	-	$1 per lecture	1,600
TOTAL		$5,878		$30,972
DEFICIT		$29,317		$ 4,223

(b) In the event of any future increase in costs these recommended rates should be adjusted accordingly.

(c) If those using this facility do not wish to cover the costs the program should be discontinued.

5. -- Drama and Dance (Except Storyland)

This section occupies approximately two-thirds of the Recreational Arts Building which was created in 1958 at a cost of $450,000. The section uses practically the entire main floor and second floors. The second floor is used principally for the storage of the costumes and properties.

This section conducts or supervises many varied activities both on recreation units and elsewhere. The activities held on recreation units consist of Storytelling, Puppetry, Adult and Junior Drama, Adult and Junior Folk Dance, Doll Shows and many others. The civic activities participated in are Columbus Day, Pacific Festival, Bay Area Folk Festival, etc.

It also maintains about 15,600 costumes and 1,800 properties used in the above activities and others where the division acts in a consultative capacity.

The annual cost of this section (exclusive of storyland) is $50,389 for personal services and $3,000 for materials. No revenue is generated by this Section directly. This is a cost of $5.50 for each of the 9,679 persons involved. This is chiefly a supervisory activity, the programs being performed for the most part away from the Recreational Arts Building at 50 Scott Street.

The Staff consists of:
- 1 Supervisor of Dramatics and Dancing
- 1 Supervising Director
- 1 Seamstress
- 1 Laundress
- 8 Recreation Directors, part-time, 7 exempt

Specific Recommendations

(a) Drama and dance activities servicing adult groups should be self-supporting.

(b) As stated above this section maintains 15,675 costumes and 1,779 stage properties for use throughout recreation installations. Their 1960 report shows

Costumes used	11,096
New costumes	885
Costumes remodeled	508
Costumes altered	671

This is an expensive operation which should not be undertaken. It is proper that parents should provide costumes for their own children, and adults should of course provide their own.

(c) A realistic survey of this Section should be made to determine actually how many persons are attracted to these programs. Stated attendance of 367,000 is arrived at as follows:

An adult drama group multiplied by 15 members multiplied by 54 meetings equals 810 "units of service" or "attendance units". In the annual reports however this 810 figure is spoken of as "persons attending" whereas actually only 15 persons were involved. Furthermore when music is also used, the same persons will be counted in reports of that Section if the activity is held in a Recreation fieldhouse, they will be counted a third time. Also a child attending several programs will be counted for each one, all of which makes "attendance" records meaningless so far as individual persons are concerned.

(d) The Recreation and Park Department subsidized the adult folk dance festival at the Auditorium by contributing $675 to defray the rental. This should be discontinued as an adult program it should pay its own way.

6. -- Music

This section occupies small quarters in the Recreation Arts Building at 50 Scott Street. It also uses the club room for group singing and some music instruction.

Music is provided for many activities held on Recreation sites and for various civic celebrations such as Columbus Day, building dedications, May Day, Stern Grove Carnival, etc., for which no revenue is received. Some activities are held at the Center or supervised from there, as follows:

(a) Recreation Symphony - a group founded by Mrs. Sigmund Stern who practice weekly at the Center and give free recitals.

(b) Adult Dance Band - an amateur "pop" music group of 20 members who meet weekly at North Beach playground and play for their own pleasure. Music Section furnishes chairs, music stands and sometimes music, but no supervision.

(c) Golden Gate Band - Another adult group of 28 members but composed mostly of Senior Citizens who meet weekly for 39 weeks a year at Eureka Valley Playground.

(d) Adult Chorus - This group of 25 members meets weekly at the Center and are instructed by the Director of music. They sing at Special Programs sponsored by the Recreation Division.

(e) Senior Citizens Community Singing - now inoperative due to lack of interest.

(f) San Francisco Boys Chorus - This group of 81 members met 84 times during the fiscal year 1959-60. They meet at Recreation Arts Building and have their own instructor. They sing in the Opera chorus.

(g) Buchner Light Orchestra - This is a group of 15 adults who meet weekly at Recreation Arts Building chiefly to read music for their own pleasure. Mr. Buchner owns a music store and formerly rented a hall, but now gets free quarters.

(h) Glen Park Drum Corps - This is a junior activity, held at Glen Park. Music Section provides the drums and the Director gives instructions.

The Music Section also assists in some degree various civic and private groups in planning and programming their events.

The Music Section states that the attendance at the above listed activities was 17,796. The number of participants was 254.

The staff consists of: 1 Supervisor of Music,
5 Recreation Directors, part-time, two of which are exempt classification
22 pianists, part-time.

The total wage cost is $31,158. The over-all service covers approximately 2,535 participants at a cost of $12.29 per participant.

Specific Recommendations

(a) There does not appear to be any revenue possibilities present in the activities occurring at the Center with the exception of the Buchner Light Orchestra. Without question this organization should be required to pay for the use of the quarters, as they were accustomed to do prior to the opening of the Center. It is recommended that the fee be fixed at $15.00 per meeting.

(b) The specialized small group activities should be discontinued, or booster club sponsorship obtained. Example - Glen Park Drum Corps - There are many drum corps affiliated with clubs and fraternities. This group should be so sponsored and equipped.

7. -- Junior Museum

This installation, as its name implies, is designed to appeal to young children and presents a variety of beginners classes in natural science, arts and crafts, and is rather heavily used by the schools for conducted tours. It is open six days (including evenings) each week and on Sundays from 11:00 a.m. to 5:00 p.m. for conducted tours.

In October 1959 a study committee on the purpose, policies and operation of the Junior Museum recommended that the Junior Museum should "present a variety of stimulating opportunities supplemental to the school classroom" and also that it "should not duplicate activities of schools and other institutions".

The Junior Museum is housed in a new building on Corona Heights, which cost approximately $390,000 and the annual operating costs are $43,738 for personal services and approximately $3,000 for materials and supplies including animal food.

The staff consists of: 1 Supervising Director
1 Curator
7 Recreation Directors (5 part-time)
1 Janitor

While no accurate figures are available for the number of persons regularly participating in the programs at this installation ("attendance units" for 1959-60 stated as 72,372), personnel at the Junior Museum estimate the number of participants to be about 700. This is a per person annual cost of over $51, which is one of the highest unit cost activities in the Recreation Division.

Specific Recommendations:

(a) No charge should be made for daytime activities which are participated in almost entirely by juniors, but a determined effort should be made to reduce the staff expense by volunteer supervisors drawn from interested science groups.

(b) The many groups meeting here in the evenings should pay the cost of providing evening supervision. The proportion of the salary cost applicable to the evening hours is $2,165 per annum and a charge of $8.00 per meeting will cover this expense, as indicated by the figures below:

Name of Group	Number of Meetings	Annual Cost
S.F. Gem & Mineral Society	1 per month	$96.00
California Alpine Club	1 per month (9 months only)	72.00
S.F. Horseless Carriage Club	1 per month	96.00
S.F. Sports Car Club	1 per month	96.00
S.F. Vultures	1 per week	416.00
Mycological Society	1 per month	96.00
Alpineers Club	1 per month	96.00
S.F. Archers	1 per month	96.00
Golden Gate Marine Aquarium Society	1 per month	96.00
Audobon Society	1 bi-monthly	48.00
Sierra Club-Natural History Section	1 bi-monthly	48.00
Sport Car Club of America	1 bi-monthly	48.00
Shetland Sheep Dog Club	1 per month	96.00
S.F. Amateur Astronomers	1 per month	96.00
" " " (telescope making, meet 5 days each week. Charge based on 84 evenings on which no other activity is scheduled)		672.00
		$2,168.00

(c) A model railroad is in process of building in a large basement and a charge should also be made for this space.

8. -- Swimming - Aquatics:

During the fiscal year 1959-1960 the attendance of the 12 aquatic units was as follows:

Indoor Pools	School Classes*	Children's Admissions	Adult's Admissions	Scrip Tickets
Balboa Pool	30,344	61,478	4,295	48
Garfield Pool	27,393	68,048	4,163	44
Hamilton Pool	26,847	21,887	1,761	22
McLaren Pool	1,539	47,131	1,656	29
Larsen Pool	9,698	98,970	9,679	80
North Beach Pool	25,643	38,482	4,806	146
Rossi Pool	42,316	57,923	4,987	110
	163,780	393,919	31,347	479
Outdoor Pools				
Herbert Fleishhacker Pool (4 mos.)**	-	26,748	7,718	30
Mission Pool (5 mos.)**	2,586	18,609	-	-
	166,366	439,276	39,065	509

Beach Locations	Estimated Attendance Units***
Aquatic Park **	884,329
Lake Merced Sports Center	162,420
Phelan Beach	421,653

* School classes are made up of approximately 10,150 Senior-high youngsters who take lessons in their physical education classes for 4 to 5 weeks.

** During 1959-60 period, due to the lack of sufficient part-time funds, it was necessary to close Mission Pool one month earlier and to operate Fleishhacker Pool for four months instead of the usual seven months. Also Aquatic Park was without lifeguard service for four months except for Saturdays and Sundays.

*** Count is made three times a day at each location, combined to make up "units."

The instruction periods were increased to 25 classes at each pool. However, for a short period all classes were discontinued due to lack of "part-time" funds. In addition to the Senior High School classes, which are handled by school physical-education instructors, the Aquatics division serviced groups including pre-school, Junior High School, and adult citizens. Also using the facilities were groups from churches, Langley Porter Clinic, Cerebral Palsy, United Community Fund Agencies, playgrounds, policemen, firemen, servicemen, airline and nursing groups, businessman's clubs and industrial groups. Red Cross Life Saving programs were emphasized during summer vacation mornings, and synchronized swim groups greatly increased during the year.

New activities included National Boat Week, SCUBA classes, and nine swim teams handled by Recreation & Park swimming instructors. Small craft instruction was given at Lake Merced to Boy and Girl Scouts, Camp Fire Girls and Coast Guard.

Rates for public swimming in afternoons and evenings at the nine pools are as follows:

Scrip Tickets - $5.00 - 15 swims, good at any pool, indoor and outdoor.

Rates

Herbert Fleishhacker	10¢ children, 50¢ adults
Mission Pool	5¢ children
Indoor Pools	10¢ children, during the day
	25¢ children, evening
	50¢ adults at all times
	15¢ suit and towel

The total revenue from swimming and rental of swim suits and towels for adults and children was $89,343.90 for the 1959-60 fiscal year. The estimated revenue for 1960-61 is $99,720 which includes: $89,000 from pools and additional revenue which will be realized by the Aquatics Section from the Fleishhacker Bath House (estimated $9,700) and the Lake Merced Aquatic Sports Center meeting room rentals (estimated $1,020). Based on this income and the 1960-61 budgeted wage expenditures of approximately $315,460, this operation will develop an estimated deficit of $215,740.

The personnel carrying on this program is as follows:

Title	Full Time	Part Time
Supervisor of Aquatics (R 106)	1	-
Head Life Guard (R 108)	1	-
Swimming Instructors (R 114)	9	23
Life Guards (R 110)	7	37
Lifeguard Watchman (R 111)	2	-
Matrons (R 112)	16	14
Lockerroom Aides (R 52)	-	34
	36	108

An additional list of approximately 50 people are available for "on call" basis, if and when heavy attendance is experienced. They are assigned on a part-time basis at any location requiring assistance.

The normal coverage at a pool includes one Swimming Instructor, one Life Guard and two Matrons. One standard of the supervision assigned is "one life guard for each 75 swimmers." Where the weather is warm and attendance heavy, only 225 youngsters to be in a pool at one time.

Specific Recommendations:

In order to reduce the approximate $215,740 deficit, the following is recommended:

(a) Increase children's admission charge during daytime hours from 10¢ to 20¢.

(b) Eliminate scrip tickets for adults due to their minimal use.

Increased revenue estimated to be $45,100.

9. -- Industrial Athletic Division (Industrial Division of Recreation and Park Department):

In 1918 a group of men in San Francisco sold various firms of the city the idea of providing employees of industrial firms with leisure time sport activities of all types. They formed the "Industrial Athletic Association" with a board of directors to guide the recreation activities of fellow employees. In 1935 the field became so large and the duties so manifold that the group could no longer devote the amount of time required to carry on the plan. They appealed to the San Francisco Recreation Department for aid and asked that the Department's adult division assume the duties performed by them. In July 1935 the "Industrial Division of the San Francisco Recreation Department" was organized. A board of directors, 10 in number, was elected from representatives of major firms to administer the work of the Industrial Division. In 1951 at the time of the merger of Recreation and Park there were 24 paid members. By July 1, 1952 there were 79 firms listed.

The administration of this division is now centralized in a board of 15 directors. There are 54 active memberships at present. Each firm is represented by one man and one woman on a Board of Representatives. They act as ambassadors of recreation with the Supervisor of Athletics (men's activities) and Supervisor of Athletics (women's activities), who are the representatives of the Department to the Industrial Division Board of Directors. The Executive Committee of this organization is composed of:

Its Officers and
Supervisor of Athletics (Men's activities)
Supervisor of Athletics (Women's activities)

They shall:

a. Submit the recreational calendar of the Recreation and Park Department.
b. Solicit, receive, investigate, and report upon all applications for membership to the Board of Directors.
c. Transact all necessary business affecting this organization.

Includes:

(1) Preparing and sending literature to all member firms concerning the particular recreational activity about to be staged.
Contact member firms and stimulate intra-plant competition.
(2) Collecting all monies due and owing to the organization for memberships and entrance fees.
Depositing and accounting for these monies.

The annual membership fee is now $15.00 per organization or team which generates annual revenue of $810 covering general expense of operation.

Programs include:

Activity	Estimated number of participants
Golf Tournaments (2)	480
Bowling - Men	175
Bowling - Women	200
Basketball League (men)	80
Basketball League (women)	48
Tennis Clinic	72
Tennis Tournaments	200
Table Tennis Tournament	130
Badminton (Weekly)	11
Soft Ball League	322
Volley Ball (mixed)	150
Snow Trip	285
Total Participants	2,153

Each firm or the individual participant pays an entrance fee to cover cost of officiating, equipment and prizes.

The Recreation Division furnishes the following manpower for the Industrial Association's activities:

Supervisor Personnel	Approx. Time Spent	Average Annual Rate of Pay	Wage Expense of Activities
1 - Supv. of Athletics (men)	15%	$8,494	$1,274
1 - Supv. of Athletics (women)	50%	8,494	4,247
1 - Supervising Director (Athletics)	15%	8,900	1,335
Total Department Wage Expense			$6,856

The Recreation and Park Department is reimbursed for these services. Based on the present firm membership, the cost is $127 per firm.

Specific Recommendation:

The expense to the department for services rendered should be reimbursed by the participating firms. One of the three methods suggested, or any combination of them, should be adopted in order to create an annual fund of approximately $7,000:

(a) Membership fees should be increased from $15 annually to a higher rate for all member firms.

(NOTE: At present it would be approximately $125 to $130 per firm.)

(b) Membership fees should be increased from $15 annually and prorated on the basis of the number of employees employed by a participating firm.

(c) Individuals or teams participating in each activity could be charged an increased entrance fee.

The cost of Recreation and Park services will be reimbursed by payment by the Industrial Division.

10. -- Softball Association:

The "Director of Athletics - Male" acts as the Commissioner of the Softball Association Activities in San Francisco. However, the nominal amount of time spent by the Director to serve this activity is covered by entrance fees paid by each team in the league.

The Director prepares the schedule for the league and collects the entrance fees, which are set to cover wages of officials, equipment used, and trophies. The officials (umpires) are furnished by the Umpires Association and are paid at the end of the season by the "Commissioner."

Specific Recommendation:

No change is recommended at this time. Any expense to the department in the future should be included in the entry fees for each league.

11. -- Golden Gate Park Tennis Courts:

The 21 tennis courts are under the direct supervision of the Athletic Section (Female) of the Recreation and Park Department. Two employees, one full-time and one part-time Recreation Director supervise these courts seven days a week at an average annual cost of $9,514.

The courts are used by some 31 groups consisting of various schools, colleges, clubs, the general public, and for top tournament play. Reservations must be made by players for week-ends, while they can use the courts week days without reservations. A reservation costs 25¢ per court per hour.

In December 1959 a club house was erected at an expense of $77,000. The entire installation is appraised at $90,000. During the 1960-61 fiscal year $21,700 was appropriated to resurface some of these courts to make them suitable for tournament play.

Approximately 11 clubs or organizations hold 11 tennis tournaments on week-ends during the year. Tournament use covers 44 days and occupies courts for approximately 1460 hours. Each player must pay an entrance fee to participate. The club, under whose auspices the tournament is held, collects such fees to cover tournament expenses, such as trophies, balls, etc. The Recreation Division assigns up to 10 of the 21 courts for such play. No fee has been charged in the past for tournament play. However, the general public cannot use the courts assigned to tournament play, yet must pay the reservation fee for the unassigned courts. Private courts, such as San Francisco State College, charge a rental as high as $50 per day for tournament use.

Income from these courts was as follows for the 1959-60 fiscal year:-

Reservations	$1,954.00	
Club house lockers (@ $3.00 annually)	389.00	
Total ---		$2,343.00
Expenditures for personal services ---		9,514.00
Net expense for personal services ---		$7,171.00

Specific Recommendations:

(a) Increase week-end reservation fees from 25¢ per court hour to 75¢. Estimated annual increase	$3,900.00
(b) Establish a tournament court fee of $40 per day to cover use of up to 10 courts. Based upon 44 tournament days, annual increase in revenue would be	$1,760.00
Total Annual Increase in Revenue:-	$5,660.00

This recommended increase in revenue added to current revenue of $2,343 and revenue from the professional at this location of $890 (based upon seven months' experience with the current agreement) would result in a total annual revenue of approximately $8,890 - leaving a deficit of approximately $625.

12. -- Camp Mather:

Based on all available data, Camp Mather produces revenue in excess of the costs of operation. Revenues from camp fees have been approximately $115,000 per season, while operating budgets have been as follows:-

1958-59	$101,066
1959-60	103,717
1960-61	104,558

The Recreation and Park Commission has increased camping fees, effective with the 1961 season. Based upon attendance in the 1960 season, this will increase revenue by $19,428 to a total of $134,669 in the 1961 season.

The figures for the 1960 season and estimates of the 1961 season are:-

	Camper days	1960 rate	1960 revenue	1961 rate	Est. 1961 revenue	Revenue increase
Adults	12,890	$6.50	$83,785	$7.50	$96,675	$12,890
Children (10-17)	5,922	3.50	20,727	4.00	23,688	2,961
Children (3-9)	7,153	1.50	10,279	2.00	14,306	3,577
Children (under 3)	1,505	N.C.	--	N.C.	--	--
	27,470		$115,241		$134,669	$19,428

Adding an additional expense of $5,000 per season, over the budget amounts shown above, to cover clean-up and maintenance by Park Division personnel, would increase the 1960-61 season costs to $109,558. On the basis of the new rate structure, this would leave an excess of about $25,000 over normal operating requirements for the 1961 season. (NOTE: The above does not consider any amounts for Reconstruction and Replacement which may be included in the budget.)

Personnel handling Camp Mather consist of:

1 - Gardener - Full Time

Part Time

1 - Janitor	$2\frac{1}{2}$ mo.
1 - Gardener	4 mo.
1 - Operating Engineer	4 mo.
1 - Accountant	7 mo.
1 - Recreation Director	$2\frac{1}{2}$ mo.
1 - Camp Manager	4 mo.
1 - Pastry Cook (Temp.)	$2\frac{1}{2}$ mo.
1 - Chef (Temp.)	$2\frac{1}{2}$ mo.
2 - Cooks (Temp.)	2 mo.
1 - Emergency Hosp. Steward	$2\frac{1}{2}$ mo.
32 - Camp Assistants (Temp.)	$2\frac{1}{2}$ mo.
44 Total	

Specific Recommendation:

No additional increase in rates should be made now. Rates should be kept under review so that they can be increased as needed to cover higher costs of operation.

13. -- Coit Tower:

This operation is primarily for sight-seers and was constructed with money received by bequest. It is open 363 days of the year. Three employees, a vendor and two janitors, man the tower.

An estimated 426,500 people used the tower for viewing the area. Those who used the elevator to reach the top, paid a fee. The revenue for 1959-60 was $35,398 and estimated revenue for 1960-61 is $32,500.

The estimated expenditures to operate the tower for 1960-61 are $22,972, for a net profit of approximately $9,528.

Specific Recommendation:

No change is recommended at this time, as it is self-supporting.

14. -- Golf Courses:

The Department operates 18-hole golf courses at Harding Park, Lincoln Park and Sharp Park (San Mateo County), and a 9-hole course in Golden Gate Park.

The personnel is composed of 17 Recreation Division employees and 42 Park Division employees. This includes:

No.	Title	Division
1	Asst. Director of Recreational Activities	Recreation
12	Starters	"
4	Janitors	"
1	Supv. of Golf Course Maintenance	Park
3	Foreman Gardener	"
1	Sub-Foreman Gardener	"
32	Gardeners	"
5	Chauffeurs (Motorized equipment operators)	"
59	Total	

The Assistant Director of Recreational Activities, who reports to the Superintendent of Recreation, handles the starters and janitors at each course. He is also responsible for the collecting of fees.

The Supervisor of Golf Course Maintenance is responsible for the general maintenance and changes of the greens and fairways and landscaping of the courses. He reports to the Superintendent of Parks.

The estimated expenditures for 1960-61 are $482,346 exclusive of fringe benefits. The estimated revenue for 1960-61 from the four courses based on the actual income during the year 1959-60 is $486,470. If these estimates are met, a net revenue of approximately $4,100 will be realized.

In the 1961-62 budget a request has been made for McLaren Golf Course to have 1 Sub-foreman Gardener, 6 Gardeners and 1 Chauffeur. This would mean an approximate $52,750 wage expenditure based on the 1960-61 average wage rates.

The following tournaments have been scheduled during the current year:

HARDING PARK

Club Championship - May 7-14 - 21-28 (4 Sundays)
Election Day - August 27 (Sunday)
Directors Cup - September 24, Oct. 1-8 - 15-22 (5 Sundays)
Turkey - December 10 (Sunday)

Qualifying 1961 Public Links Championships - June 17-18 (Saturday and Sunday).

LINCOLN PARK

Club Championship - April 9-16 - 23-30 May 7 (5 Sundays)
Directors Cup - Oct. 8-15 - 22-29, Nov. 5 (5 Sundays)
Thanksgiving - November 19 (Sunday)
Christmas - December 3 (Sunday)

SHARP PARK

Club Championship - May 21-28. June 4-11-18 (5 Sundays)
Medal Play - August 6 (Sunday)
Directors Cup - Sept. 10-17-24. Oct. 1-8 (5 Sundays)
Turkey - November 11 (Saturday)

Industrial Division Recreation and Park Department - April 15-22 (2 Saturdays).

These tournaments decrease the Sundays available for public play, as they are only open to course "Club Members." An individual may not be able to obtain a starting time on these days. There have been a number of complaints registered relative to this subject, as the courses are supposed to be open to public play. Normally, starting times for Saturday are reserved at the Recreation and Park Department headquarters on the preceding Tuesday, while Sunday reservations are made the previous Wednesday.

The Recreation and Park Commission recently adopted the aforementioned tournament schedule with the provision that a comprehensive study be made relative to future times and dates of tournaments. No further "Club" Tournament dates are to be set until such a study is completed in an effort to treat all citizens fairly and equitably.

The current golf fees were increased slightly in early 1959. The rate per round was increased from $1.50 to $1.75 at Lincoln in March, 1961. (See Golf Rates - Exhibit XXV) Revenues from all sources was $484,000 during the 1959-60 operation.

The attendance based on the number of rounds of golf and revenue for 1959-60 was as follows:

	Course	*No. of Rounds	1959-60 Revenue
(a)	Harding Park	125,552	$179,700
(b)	Sharp Park	86,043	125,300
(c)	Lincoln Park	72,550	95,600
(d)	Golden Gate Park (9 hole)	91,660	66,600
	Food Sales		16,800

*(Includes monthly cards, regular, late and student rounds)
Combining (a), (b) and (c) - Average round,...$1.37 per round
(d) Only, ... " " ,...$ .72 " "

Specific Recommendation:

A golf fee increase is recommended, whenever additional revenue is required to cover any "out-of-pocket" expense for any wage increase adopted, including payroll fringe benefit costs. This will continue this operation on a self-supporting basis.

For the fiscal year 1959-60, the entire golf operation has been self-supporting with a small surplus revenue if payroll fringe benefits are ignored. However, if the proposed approximate 5% wage increase is adopted by the Board of Supervisors, this will mean an estimated increase of $23,600 for base salaries and wages. In addition, if the McLaren Park Course personnel requirement is approved, an additional $52,750, plus 5% increase of $2,638, or $55,388, must be added to the golf course's annual wage costs. Payroll fringe benefit costs will total $77,000.

15. -- Stadiums and Kezar Pavilion

(a) Balboa Stadium is used exclusively for soccer football contests. The top league or first division soccer teams play their games here. The city receives a percentage of the revenue from paid admissions to special soccer events. This revenue amounted to $3,328 in 1959-60, and is estimated to be approximately $2,500 for 1960-61. No expenditure figures are available for this stadium itself, as it is maintained as a part of Balboa Park.

(b) Golden Gate Park Stadium is used for polo games, track meets, high school football practice and games, bicycle races, and rugby games. One man maintains the janitor services. The estimated expenditures are $10,265, which includes wage and miscellaneous expenses. The polo field rental of $220 for 1959-60 is the only revenue attributable to this operation. This is derived from a fee of $10 per game. Revenue of $230 is estimated for 1960-61. This does not nearly cover the expense for a crew of eight or nine men who must spend half a day reconditioning the field the morning after a game.

(c) Kezar Stadium and Kezar Pavilion are combined for Recreation and Park accounting records and for the purpose of this report.

The two locations had the following events during 1959-60:

	Basketball Games	Football Games	Track Meets	Special Events	Rental	Estimated Attendance
Kezar Stadium	-	38	*54	-	$153,694	560,000
Kezar Pavilion	*106	-	-	7	2,953	56,600

*Participation from public and parochial schools, several athletic clubs, and Industrial League Basketball.

The special events were composed of Northern California Table Tennis Championships, San Francisco Examiner Basketball School, folk dancing on eight Sundays, Boy Scouts Night, Drum and Bugle competition sponsored by Native Sons, and Shrine Drill Team in drill practice once a week for a four-month period.

During 1960-61 the same events are anticipated, and, in addition, there will be approximately 72 special boxing and wrestling events in the pavilion. These latter guarantee $250 each, or approximately $18,000 income.

These three stadiums and the pavilion combined will have an estimated 673,100 attendance, $113,479 in expenditures, and $195,730 in revenue. This would net approximately $82,251 in revenue for the year 1960-1961.

Specific Recommendations

(a) In the future all outside adult groups (other than programs for children and Recreation Division organized programs) which hold special events or activities at Kezar Stadium, Golden Gate Park Stadium, or in Kezar Pavilion, should pay a fee sufficient to cover the related expenses of the Department. A definite schedule should be established and a procedure printed as to the method of handling such requests. The plan should include a fee for such activities as folk dancing, drum and bugle corps competition or practice, drill team competition or practice, etc.

(b) A minimum fee of $100 per polo game should be charged to cover the major portion of the Department's expense of maintaining the Golden Gate Park Stadium.

16. -- Model Yacht Club

This facility, located in Golden Gate Park, is the center for model motor boat and sail boat construction and operation. Spreckels Lake, which is immediately adjacent to the clubhouse, affords the necessary water facilities for the model marine activities.

The membership of the club, which is open to the general public, consists of 67 members at present. This number varies depending upon current activities and interest.

The small building is maintained by the membership, while the grounds are maintained by Park Division personnel as a part of Golden Gate Park.

No recreation supervision is provided for this activity.

Specific Recommendations

(a) As there is no specific Recreation Department coverage at this location, no change is recommended in operation or fee to be charged for this facility at this time.

(b) In the future no facilities should be provided or erected by Recreation and Park exclusively for small groups of citizens to handle specialized sports or activities.

17. -- Angler's Lodge

This building is used for meetings of the Golden Gate Angling and Casting Club, the Sheriff's Air Squadron Patrol and San Francisco Mounted Patrol. Each group has one regular meeting per month.

The Angling and Casting Club maintains and polices the lodge building. The fly casting pools are used by the Angling and Casting Club enthusiasts and have become nationally and internationally known.

The Recreation Division does not provide supervision at this installation. The grounds are maintained as a part of Golden Gate Park.

Specific Recommendations

(a) As there is no specific Recreation Division coverage at this location, no change is recommended in operation or fee to be charged for this facility at this time.

(b) In the future no facilities should be provided or erected by Recreation and Park exclusively for small groups of citizens to handle specialized sports or hobbies.

18. -- San Francisco Zoological Gardens

The 1960-61 budget for the San Francisco Zoo was $451,200. The personnel at the Zoo consist of:

Director of the Zoo	1
Head Animal Keeper	1
Asst. Head Animal Keeper	1
Animal Keepers	28
Operating Engineer	1
Working Foreman Janitor	1
Janitors	4
Janitress	1
Foreman Gardener	1
Gardeners	10
Total	49

Attendance was approximately 1,500,000 (based upon a report in Zoos and Aquariums in the U. S. and Canada, American Association of Zoological Parks and Aquariums - October, 1958). There are no accurate records to indicate the relative proportion of children and adults visiting the Zoo. However, there is substantial agreement that a one-to-one ratio, or fifty per cent adults and fifty per cent children, would be a reasonable estimate.

A survey made by the San Francisco Zoological Society in the summer of 1959 indicated that only 25% of the visitors to the Zoo were residents of San Francisco. The actual distribution was as follows:

San Francisco	25%
Rest of Bay Area	37
Rest of California	25
Rest of U.S.	12
Foreign	1
	100%

The San Francisco Zoological Society works closely with the Zoo administration. They operate rides and food concessions in the Zoo and at the associated Fleishhacker Playground. (Payment to the city for these concessions will approximate $19,000 for the fiscal year 1961-62.) The profits of the Society's operations are devoted to providing for the Zoo animals, animal structures or cages and equipment not available from the budget.

Specific Recommendations

It is recommended that admission charges be made at the San Francisco Zoo.

Based upon annual attendance of 1,500,000 (750,000 adult and 750,000 children) admission charges of 75 cents for all persons 14 years old or over would produce revenue of $562,500 per year.

Many cities (a partial list is shown in Exhibit XXVI) charge admission to their Zoos, thus defraying all or a portion of the expense of operation.

Collecting admission charges will, of course, add to the cost of operation of the Zoo. There are two entrances that would have to be covered. The use of coin operated turnstiles, with related cashiers' booths would probably be the most economical way of collecting admission charges. It would appear that two booths at the main gate on Sloat Boulevard and one booth at the south entrance would be adequate. Furthermore, it probably would not be necessary to man one of the two booths at the main gate except on Saturdays, Sundays and holidays. To maintain this coverage, salary expenses, including relief, vacation, and holiday coverage, and also including retirement contributions and Social Security taxes, would amount to approximately $31,000 per year (excluding any consideration of additional capital expenditures).

On the basis that 75% of the people visiting the Zoo come from out of town, the suggested charges would result in payment by out-of-town visitors of about $421,875 per year toward the operation and maintenance of the Zoo, with a corresponding reduction in the requirement for funds from the ad valorem tax. Payments made by San Francisco residents, on the same basis, would amount to $140,625, which would also reduce by this amount the requirement for tax monies. Thus, those using the Zoo would pay all costs of operation.

19. -- Storyland

This new facility, located near the Zoo, was built in part with $116,750 received from public subscription and $249,803 from the General Fund. The staff consists of two Recreation Directors and two Recreation Assistants.

The estimated cost of operation for the fiscal year 1960-61 is:

Personal services	$50,240
Materials, supplies, etc.	1,275
	$51,515

An admission charge of 10¢ is made for children under 12, and 15¢ for all others.

In its first year of operation (fiscal 1959-60) admissions totaled $68,300 and revenue from concessions $3,000, or a total of $71,300. However, this very favorable result was apparently due to its novelty, as the revenue for fiscal 1960-61 is estimated to be $43,000 and for 1961-1962, to be $37,000.

The projected continuing falling off of income seems to indicate that to a great extent, this installation has a one-visit appeal. This is borne out by a drop of about 40% in attendance from the first to the second year of operation and a further drop expected next year.

Recreation and Park Department publicity states that "Storyland gives the most for the least to the people of any project of its caliber."

Specific Recommendations

(a) While no revision of fees is recommended at this time, a close watch should be kept on this activity, and if the 1961-62 admissions decrease in accordance with present estimates, Storyland should be abandoned or a concessionnaire sought to operate the facility at a profit.

(b) It has been planned to double the size of this installation at an additional cost of about a quarter of a million dollars. In view of the observations above, it is recommended that this proposed expenditure be abandoned or deferred until the installation has demonstrated that it can be made self-supporting, including the future repair and maintenance costs, which, at the present time, are at a minimum due to its newness. As an alternative, this expansion might be made, but only if the cost were entirely covered by public subscription in the manner of Oakland's "Fairyland."

As a matter of interest, "Storyland" was erected, its proponents say, because a then member of the Board of Supervisors "wearied of driving his daughter to Oakland's Fairyland."

Fairyland, however, was conceived and is operated on a different basis than "Storyland." It was started by an association called "Lake Merritt Breakfast Club," and all costs were defrayed by public subscriptions, legacies, and bequests. The funds are deposited in a bank as a private Trust Fund separate from municipal funds, and are administered by the Recreation Board with the concurrence of the Club, and is entirely self-supporting. The installation was planned and built by the staff of the Department and the Club. The installation is beamed more to a domestic animal zoo and play apparatus.

Fairyland is an example of an activity maintained by private support and modest fees paid by those who patronize it. San Francisco could well follow this example when small pressure groups agitate for a special program or installation beamed to a limited number of persons. Had this been done, Storyland would have been developed more along the lines of Fairyland and only within the limits of funds provided by public subscription.

20. -- Rifle Range at Sharp Park

Eleven thousand seven hundred sixty-two service units were handled on weekends and during three tournaments at the range at Sharp Park.

Two part-time Recreation Directors and one maintenance man operate the range at an estimated annual cost of $2,988 for wages. The revenue from this installation was $4,217 for 1959-60, and is estimated it will be $4,200 in 1960-61.

R.O.T.C. units and the Sheriff's Posse use the range free of charge.

Specific Recommendation

As long as the revenue from this operation continues to cover the expenditures, no change in operation or increase in fees is recommended.

21. -- Archery Range at Sharp Park

The archery range at Sharp Park is used by individuals and groups daily and on weekends. No organized on-the-ground supervision is provided by the department.

The club groups that use the range provide their own supervision. They hold five to seven special shoots each year. Reservations for the range are cleared through the Recreation Division (Athletic Section).

Specific Recommendation

As long as this operation does not cause the department any expense, no change in operation or fee is recommended.

22. -- Beach Chalet Operation

This building, located in Golden Gate Park, is leased to the Veterans of Foreign Wars, J. C. McQuaid Post, on an annual basis for $50.00 per month minimum guarantee. In turn, it is used by various clubs, associations, or groups for dances throughout the year on a sub-lease basis. Each group who sub-lease the building pay a scheduled fee to the V. F. W. Post. In turn, the city receives a small percentage from each rental.

The Veterans Post cleans the building, so that Recreation and Park Department need not furnish manpower. The Commission, however, must approve any sub-leasing of the building.

Specific Recommendation

No change is recommended, as long as Recreation and Park Department reviews the use of the property on a periodic basis.

23. -- Yacht Harbor Rentals Operation

At present, there are a total of 257 berths in the Municipal Yacht Harbor. Of these, only 32, built in 1959, are of modern construction with both header floats and slips or finger floats, and with water and electricity available to each boat. The other 225 berths consist, for the most part, of two, four, or more piles, and nothing else. Of these only 53 have header floats. Header floats at all other berths in this group, and slips or finger floats in all of these berths, must be provided at the expense of the lessee of the berth. Water and electricity connections must also be provided at the expense of the occupant. In effect, the city rents the water space for these old berths.

Rates for the 32 new berths are, in general, higher than the charges made by other small boat harbors in San Francisco Bay area providing the same service and facilities. These rates should not be changed.

Rates for the old berths are generally considerably below rates in other small boat harbors on the Bay. This comparison is not fully significant since the other harbors provide all floats as well as electricity and water connections.

Personnel handling the Yacht Harbor are:

1 Harbormaster (Limited tenure) C-160	$ 5,919
3 Watchmen C-152 (24 hour a day coverage)	14,382
1 Watchman (Part-time) C-152 (Covers Saturday nights, vacation relief, holidays, etc.)	1,600
Annual wage total	$21,901

At present rates, annual revenues from the Yacht Harbor will be approximately $42,600 for the fiscal year 1960-61. Expenses, including salaries, contract charges, material and supplies, public utilities, retirement allowance, and repairs are estimated at about $32,300 for the fiscal year 1960-61. This leaves approximately $10,300 as income in excess of expenditures (excluding any consideration of capital charges). It is possible that the proposed expansion and rehabilitation plans for the Yacht Harbor, based upon a state loan, will be adopted. In this event, one requirement of the state will be the establishment of rates adequate to make the operation self-supporting, including major maintenance, operating costs, interest, and amortization of the loan.

Specific Recommendation

If the proposed plan is not adopted, or is delayed, it is recommended that a simple departmental survey of the old berths be made to correct existing records, which, in many instances, do not reflect the correct size of berths. Following this, new berthing rates should be established, based upon a realistic evaluation of the value of the berthing space on the Marina, taking into consideration the minimal facilities provided. It is believed that such an approach would result in an appreciable increase in revenues.

GOLF RATES

EXHIBIT XXV
(As of 3/1/61)

MONTHLY CARDS:	Good on week days and after 2 p.m.	$ 6.00
	Saturdays, Sundays and Holidays on all courses (4 p.m. (D.S.T.))	
	Charge per round played	.25
NEW REGULATIONS:	Students must have an authorized "Qualification Card" to play on regulation length courses.	
HARDING:	Per round (Saturdays, Sundays and Holidays included)	2.00
	After 2 p.m. (Saturdays, Sundays and Holidays included) (4 p.m. (D.S.T.))	1.00
	No special rates for students	
HARDING NINE-HOLE COURSE:	Per round (Saturdays, Sundays and Holidays included)	.75
SHARP PARK:	Per round (Saturdays, Sundays and Holidays included)	1.75
	After 2 p.m. (Saturdays, Sundays and Holidays included) (4 p.m. (D.S.T.))	1.00
	No special rates for students	
LINCOLN PARK:	Per round (Saturdays, Sundays and Holidays included)	1.75
	After 2 p.m. (Saturdays, Sundays and Holidays included) (4 p.m. (D.S.T.))	1.00
	Student's Monthly Card good weekdays only after 2 p.m. Junior High School Students only	3.00
	No special rates for students (other than Monthly Card)	
GOLDEN GATE PARK GOLF COURSE:	Per round (Saturdays, Sundays and Holidays included)	.75
RESERVATIONS:	Lincoln, Harding and Sharp Park Golf Courses, Saturdays, Sundays and Holidays only, per person	.25

EXHIBIT XXVI

ZOO ADMISSION CHARGES

Cities	Adults	Children
Phoenix	$ .50	$ .25
Los Angeles	.25	.15
Sacramento (Children's Zoo)	.15	.10
San Diego	.75	(Free to 16)
Granby, Quebec	.25	Free
Colorado Springs	.25	.25 (over 5)
Daytona, Florida	1.50	.60 (over 6)
Silver Springs, Florida	1.15	.60
Brookfield, Illinois	.25	Free
Libertyville, Ill. (Sat.,Sun.& Holidays)	.25	.10
Peoria, Ill.	.35	(Free to 15)
N. Y. Zoological Park	.25	.25 (over 4)
Cincinnati	.50	.25 (2 to 12)
Cleveland	.25	(Free to 12)
Columbus	.35	(Free to 12)
Toledo	.50	(Free to 12)
Philadelphia	.75	.25
San Antonio	.35	.10
Salt Lake City	.25	.10 (over 5)
Average	$ .47	$ .25 (average of Cities charging for all children.)

X

SAVINGS AND ADDITIONAL REVENUE

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SAVINGS AND ADDITIONAL REVENUE

The adoption and implementation of recommendations made by the Recreation and Park Task Force would result in the following:

Savings:

1. Reduction of current operating costs through elimination of 17 positions resulting from reorganization and curtailing of [illegible] rescheduling of morning programs to afternoons, and application of work measurement techniques,.....$610,000

2. Estimated one-time realization of value of eight major properties:

McLaren Park (undeveloped portion)	$3,600,000
Bay View Park	130,000
Sunset Heights Park	125,000
Du Pont and Richmond Tennis Courts	288,000
James Rolph, Jr. Playground	305,000
Bay View Playground	250,000
Alta Plaza (portion)	520,000
Lafayette Park (portion)	406,000

(Note: Additional savings could undoubtedly be achieved through a detailed and complete survey of all Recreation and Park properties)

3. Prevention of estimated future operating costs through disposition of land(2.),..... [illegible]

4. Prevention of proposed capital improvement expenditures:

a. Included in 5-year program:

McLaren Park (excluding golf course) 2,230,000
Balboa Park Nursery (move to McLaren) 170,000

b. Long-range program:

McLaren Park 4,270,000 [illegible]

Additional Revenue:

1. Estimated annual ad valorem taxes from land returned to the tax rolls (2.),..... [illegible]

2. Estimated proposed new or additional admissions and fees,..... [illegible]

52.079
a54r

A REPORT TO THE BLYTH-ZELLERBACH COMMITTEE

ON MODERN MANAGEMENT FOR SAN FRANCISCO

The Budget

Wage and Salary Administration

Purchasing and Related Activities

JUNE 1961

VOLUME 4

THE BUDGET

WAGE AND SALARY ADMINISTRATION

PURCHASING AND RELATED ACTIVITIES

Reports of the
Task Forces

June 1955

A
REPORT
WITH RECOMMENDATIONS
CONCERNING

THE BUDGET

OF THE CITY & COUNTY
OF SAN FRANCISCO

BY THE
BUDGET TASK FORCE
OF THE
MAYOR'S COMMITTEE FOR MUNICIPAL MANAGEMENT

MAY 1961

May 1961

Marshall G. Mustain,
Project Director
Mayor's Committee for Municipal Management
San Francisco, California

Dear Mr. Mustain:

During the past five months the Budget Task Force has studied the design, preparation and utility of the San Francisco City and County budget. This team consisted of three analysts, all having had many years experience in systems and procedures work.

Throughout this survey important background knowledge was obtained by study of current budget literature. The writings of recognized authorities in the field of municipal budgeting were examined, including the following:

Orin K. Cope, Assistant to the City Manager, San Diego, California

Vernon E. Koch, City Budget Director, Cincinnati Ohio

Samuel Leask, Jr., Chief Administrative Officer, Los Angeles, California

Frank A. Lowe, Municipal Finance Officers Association

Homer D. Reed, City Manager, Valdosta, Georgia

George C. Shannon, City Manager, Anchorage, Alaska

Frank P. Sherwood, Assistant Professor, School of Public Administration, University of Southern California, Los Angeles, California

Ralph W. Snyder, City Manager, Highland Park, Illinois

John F. Willmott, Director, Dade County Research Foundation, Miami, Florida

In addition, much assistance in the development of this project was obtained from material contained in

Budgeting and Accounting - U.S. Commission on Organization of Executive Branch of Government, (Hoover Commission) A Report to the Congress February, 1949 and June, 1955.

Budgeting, The Tax Foundation, New York City

Municipal Year Books, International City Managers Association

Public Management, Journal of the International City Managers Association

The budgets and procedures of fourteen other cities and counties were examined. Included were the cities of New York, Chicago, Los Angeles, San Diego, Milwaukee, Buffalo, Detroit, St. Louis, Cincinnati, Oakland and Philadelphia, and the counties of Los Angeles, San Diego and Milwaukee.

The advantages and disadvantages of the San Francisco budget were studied in detail from top management, through the chain of responsibility, to the smallest organizational element in two major departments of the city government. This survey enabled the task force to develop and explore in detail the strengths and weaknesses of current operating procedures and to relate forms, methodology, purpose and results with the views and experiences of budget authorities and the procedures in use in other jurisdictions. Other Task Forces contributed extensively through questioning budget preparation and utility in departments surveyed and in relaying constructive ideas for improvement. Findings and suggested measures for improvement were discussed with executives of city departments.

Both preparation and administration of the budget by the Controller's Department were studied. The Controller has been working for several years on possible revisions of format and concept and was most cooperative and helpful through counseling with the Task Force and in the interchange of ideas. Similarly, management and personnel of other departments visited cordially assisted in completing the survey.

Every effort has been made by all concerned to conduct this survey in a purely objective manner. We believe the following findings are factual and that adoption of the recommendations in the report will produce an outstanding improvement in budgetary procedure. This, in turn, will contribute in great degree to effectiveness and economy in city administration.

A. P. O'Kane
Chairman

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2	ORGANIZATION OF BUDGET DEPARTMENT
3	JOB SPECIFICATION - BUDGET DIRECTOR
4	JOB SPECIFICATION - SENIOR BUDGET ANALYST
5	JOB SPECIFICATION - BUDGET ANALYST
6	JOB SPECIFICATION - JUNIOR BUDGET ANALYST
7	WORK PROGRAM FORM - BUDGET WORK SHEET
8	WORK PROGRAM FORM - CAPITAL OUTLAY DETAIL
9	WORK PROGRAM FORM - PERMANENT SALARIES DETAIL
10	SUMMARY FORM - WORK PROGRAM SUMMARY
11	SUMMARY FORM - EXPLANATION SHEET
12	SUMMARY FORM - CAPITAL OUTLAY SUMMARY

SUMMARY

SUMMARY

SCOPE

During the past five months the Budget Task Force, consisting of three experienced business analysts, studied the design, preparation and utility of the San Francisco budget. Extensive research was conducted in budgeting systems and procedure which included the study of the writings of authorities of national reputation, and a review of the budgets and procedures of cities, such as New York, Chicago, Los Angeles, Detroit, Milwaukee, Cincinnati, Philadelphia, Buffalo, Oakland, San Diego and St. Louis and similar documents of several counties.

Local surveys of budgetary practices were conducted in depth in two major departments, supplemented through discussions of this subject by task forces in the organizations they surveyed.

All findings and constructive ideas developed were discussed with supervisors and department heads.

FINDINGS

The San Francisco budget system is obsolete. It is an "Object of Expenditure" or "Line-item" type of budget now discarded or in the process of being discarded by most progressive city governments. In an Object of Expenditure type budget emphasis is placed on items to be purchased, such as labor, materials and supplied instead of on the activities to be performed and the services to be rendered.

The San Francisco budget is excessively cumbersome and filled with unnecessary detail. In 1960-61, it consisted of 2,067 pages, measuring 17" x 24" with a total weight of 130 pounds. Later it is reduced photographically to 11" x 17", weighing 21 pounds. The documents are too voluminous and unwieldy to permit full review or intelligent approval.

Budgets are inflated at the department level in order to expand the department's functions, to increase its personnel, to maintain job security or in anticipation of drastic pruning. Many such amounts escape the pruning process and are added to the department's "hidden surplus" for future years. Once established, departments frequently protect these levels of expense by spending the full budgeted amounts, despite efforts of the Controller to prevent this practice.

San Francisco budget review procedures focus exclusive attention on the increase over the previous year's expenses. There is little or no effort to evaluate and justify already existing expenses, and for practical purposes, once established, a level of expense is fixed and can continue indefinitely. Frequently the reasons for budget reductions are not given to department heads. Also, because under Object of Expenditure treatment various elements of a proposed activity may have to be listed under several different items, occasionally one essential element of such activity is disallowed with other items approved.

There is no centrally apparent activity to create cost-consciousness in the city organization. A budget normally is intended to control expenditures, but the San Francisco version both in type and practice works in reverse. San Francisco's procedures invite and encourage extravagance.

Newspaper publication of the budget and Appropriation Ordinance is expensive and ineffectual.

RECOMMENDATIONS (Charter revision will be necessary)

A complete change in the concept of budgeting is urgently needed and a Work Program type budget should replace the present Object of Expenditure budget.

Requests for budget funds should be expressed in dollars needed to accomplish specific end results rather than to buy certain commodities. These end results (Work Programs) should identify and describe the basic purposes for which departments, bureaus or divisions are established. This change will shift emphasis from men, materials and machines to the functions, activities and services the city government provides to its citizens.

The Work Program format should consist of: (a) description of the functions of the department; (b) separate activities (Work Programs) within each department; (c) activity statistics to depict work-load trends; and (d) short, pertinent explanations as to basic reasons for changes proposed.

The Work Program type budget will give department heads and supervisors an improved management tool; it will provide information to the administrative and legislative branches of government for policy formulation, development and maintenance of service standards, priority determination and expenditure control; it will give citizens an understandable document and will promote public interest in the effectiveness and efficiency of government; it will permit, with safety, considerable decentralization of authority to lower levels of management.

The budget form should be reduced from 17 x 24 inches with twenty-nine columns to letter size with nine columns. Instead of the present 130 and 21 pound documents the Work Program budget will weight about one pound, making it a usuable instrument convenient to handle and portable between officers for committee discussions.

With this reduction in size the Mayor's budget should be produced in sufficient quantities to permit distribution to news media, civic committees, associations, libraries, schools, etc. This will eliminate publishing in newspapers and will provide better information to interested citizens at a fraction of the present cost.

A vital part of Work Programming is the establishment of a Budget Department. This unit is necessary not only to design, install and administer the Work Program budget but also to maintain a constant, scheduled surveillance over existing manpower and expense. Detailed organization and functions of the Budget Department, with suggested forms and procedures for Work Programming are contained in the main body of the report.

Important responsibilities of the Budget Department will be to develop in all departments an attitude of cost-mindedness, to control inflation of budget estimates and to eliminate the spending of unnecessary budgeted amounts.

No material change is anticipated in the cost of preparing and operating the proposed Work Program budget as compared to the present Object of Expenditure budget. Increased analytical work will be offset by reductions in the immense quantity of detail now required. However, the effect of the Work Program budget plan, including the scheduled surveying of existing costs and previewing of budget requests by Budget Department analysts, will uncover savings of very substantial proportions. Based on the results of pilot-type studies of the city organizations made by this Committee, it is estimated that an annual saving of five percent of the total budget (other than that of the School Department) can result. This will amount to approximately $10,000,000 annually.

The Budget Task Force

A. P. O'Kane, Chairman
Russell Ancell
Marion Marks

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FINDINGS

TYPE OF PRESENT BUDGET SYSTEM

The San Francisco budget document is known as an "Object of Expenditure" or "Line-Item" type of budget. Such a budget lists salaries, wages, articles to be purchased and justification of items in great detail, with little information as to the end purposes for which the money is to be spent. The Object of Expenditure budget is well described as an "impenetrable thicket" and as a "guessing game in which the immense compilation of uninformative budget items seem designed to defy interpretation and defeat attempts at analysis." Such a budget is practically unintelligible to the public.

The Object of Expenditure budget was designed primarily for accounting and fund control purposes. In recent years, in most large cities, in many small cities, in counties and in states, the budget has been redesigned and has emerged as a most valuable tool for effective and efficient administration.

The new types, termed Work Program, Activity or Performance budgets, emphasize the cost of services to be rendered instead of only the objects for which money is to be spent.

San Francisco's budget was adopted many years before the present charter was placed in effect. In it, in 124 departments, bureaus and divisions, proposed expenditures are first listed by object of expenditures classifications such as "Personal Services", "Contractual Services", "Materials and Supplies", "Equipment", etc. These basic classifications are then sub-divided to show greater detail. For example, under "Personal Services" is shown "Overtime", "Holiday pay", civil service classifications, and, in some instances, employees' names. "Materials and Supplies" is sub-divided to show items such as postage stamps, tools and wheelbarrows.

Historical expenditures in dollars are shown for each of these items under columnar headings and, when applicable, the rate and number of employees, current year probabilities, proposed amounts and change, together with several spaces for different levels of approval. The Object of Expenditure system requires a tremendous volume of explanatory material, as increases in each item of expense must be fully supported.

SIZE OF BUDGET

The budget page is designed with twenty-nine columns. (Exhibit 1.) In 1960-61, the original compilation consists of 2,067 pages, each 17 x 24 inches in size, bound into three huge volumes weighing 130 pounds. After the Mayor's adjustments, the budget is reduced to pages 11 by 17 inches in size with three volumes weighing about 21 pounds.

The San Francisco budget is so voluminous and unwieldy it is physically impossible for any one person to fully review or intelligently approve it. No summary or condensation is provided. The Mayor and Board of Supervisors must depend on staff personnel to select the items which should receive their attention. The great mass of descriptive detail is stated in vague and general terms, often differing as to type and volume of detail between departments. Many departments depend on quantity of detail and rarely is there sufficient demonstration of the relationship to health, safety or protection of property, or demonstration that the proposed expenditures can be justified by "pay-out" or return on the investment.

NO EXAMINATION OF CURRENT EXPENSE

San Francisco budget procedures focus exclusive attention on the increase over the previous year's expenses. There is little or no effort to evaluate and justify already existing expenses, and for all practical purposes, once established, a level of expense is fixed and can continue indefinitely.

(The office of the Administrative Assistant to the Mayor was established to examine current manpower and other forms of expense, but no scheduled activity of this nature is carried on because the processing of supplementary requests, budget review and special assignments occupy the full time of this office.)

PROTECTION OF EXPENSE LEVELS

Departments frequently protect these levels of expense by spending the full budgeted amounts, whether for essential purposes or not, despite efforts of the Controller to prevent this practice.

BUDGET INFLATION

Budgets are inflated at the departmental level, to expand the department's function or personnel, to maintain job security, or in anticipation of drastic pruning by the Mayor and the Board of Supervisors. In several quarters it has been stated that inflated budgets are presented in order to provide top management with opportunities to make cuts and obtain publicity as "guardians of the taxpayer". In any event, buried in the tremendous detail of the budget, many inflated items escape the "slashing" process and become permanent additions, adding to the department's "hidden surplus" in future years.

Further, the budget document is unnecessarily enlarged and complicated by including transfer and supplementary data. As regards supplements to the budget, a reveiw indicated that in 1959-60 there were a total of 450 supplements containing 700 additional items. Of these supplements, 29% should have been handled through normal budgetary procedure. Another 29% of the supplementary requests arose from reductions made by the Mayor and Board of Supervisors, which then had to be reinstated. The remaining 42% of the requests were "unforeseeable emergencies"-the only valid reason for supplements.

REVIEW PROCEDURE

The budget is produced under conditions of pressure and strain, with much night and week-end work. Approximately 65,000 man-hours are spent in completing the documents. There is general complaint as to budget review procedure:

(1) At some budget meetings, managers are given little opportunity to discuss cuts. Reductions are frequently made with no explanations to affected departments. This not only results in the same requests in subsequent years, but produces resentment, confusion and a sense of frustration within the departments.

(2) Recently, some opportunity has been provided to express recommended priorities between several proposed items of improvement and repair, but this system has not been extended to the degree needed.

(3) Under "line item" treatment, a proposed project may require funds to be listed under two or more Object of Expenditure headings, with the result that reductions can remove an essential part of an activity and leave the remainder of the activity unchanged.

DIVIDED RESPONSIBILITY

The San Francisco budget is not considered "The Mayor's Budget" as is the situation in many other major cities. The relationship between the Mayor and the Board of Supervisors is not one in which the Mayor is voted funds and then held responsible for results. Rather, the reviews by the Mayor and by the Board of Supervisors are independent and are not coordinated. The Mayor does not defend before the Finance Committee of the Board of Supervisors that part of the budget which he has previously approved, nor is he advised of the reasons for the Board's reductions. Throughout the year the Board of Supervisors requires department heads (not the Mayor or his representative) to explain the need for their supplemental appropriations. Instruction for budget preparation and use are given by three separate offices -- The Controller, The Mayor and the Board of Supervisors. Confusion as to who is in charge necessarily results.

INCENTIVES TO COST CONTROL

There is no centrally sponsored activity to create cost-mindedness in the city organization. The primary purpose of a budget is to control expenditures, but the San Francisco version both in type and practice works in reverse. San Francisco's system and procedures invite and encourage extravagance.

PUBLICITY IN BUDGET

The budget and Appropriation Ordinance are first published in the official newspaper, by Charter requirement, at the time the Mayor forwards the proposed budget to the Board of Supervisors. The budget issue of the newspaper fills 110 pages of Object of Expenditure detail in very small type, but contains no descriptive material or supporting statistics. There is little information given readers as to the activities for which money is to be spent and no justification for any of the activities.

After changes by the Board of Supervisors and before final reading, the Appropriation Ordinance is again published, as required by the Charter, in the official newspaper. Publication costs approximately $30,000 annually.

In view of the above and as newspaper issues in question are limited both in number and distribution, the cost of publication can be questioned.

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The above findings should not be construed as criticisms of those involved. The Controller, the Chief Administrative Officer, other members of Management, the Mayor and the Board of Supervisors are doing their best with an antiquated and obsolete system.

(2) BUDGET AS RECOMMENDED BY THE MAYOR
(3) BUDGET AS ADOPTED BY THE BOARD OF SUPERVISORS

FISCAL YEAR 1960-1961

Department, Board or Commission: RECREATION & PARK | Bureau or Division: GENERAL | Appropriation Number: 0.653 | Sheet Number: 23 of 67 sheets | Index Number: 651

Line Number	Actual Expenditures 1958 - 1959 (Dollars Only)	Budget Salary Cert. Sec. No.	Budget Number of Employees	Budget Rate	Supplemental Appropriations or Modifications Date	Supplemental Appropriations or Modifications Number of Employees	Supplemental Appropriations or Modifications Rate	Supplemental Appropriations or Modifications Amount (Dollars Only)	Budget Amount (Dollars Only)	Estimated Actual 1959-1960 (Dollars Only)	Estimated Last 6 Months (Dollars Only)	Estimated for Year (Dollars Only)	Class Number of Code	Class Title or Description	Number of Employees	Rate	Amount (Dollars Only)	Comparison of Employees: Years 1959 - 1960 Budget Cols. 9 and 6 (+ Increase) Increase	Comparison of Employees: Amount	Recommended by Chief. Bureau Continuing or Department: Number of Employees	Rate	Amount (Dollars Only)	Budget as Recommended by the Mayor: Number of Employees	Rate	Amount	Budget as Adopted by Board of Supervisors: Number of Employees	Rate	Amount	Reference Letter	Line Number
1														MATERIALS AND SUPPLIES - GENERAL DIVISION															1
2	3 956				2 500	SJV 272		-1 250					301	Tires and Tubes					-2 500										A	2
3	7 186				6 000	SJV 272		-2 500	458	542	1 000		303	Replacement Parts for Other Equipment			8 000					6 000			6 000			A	3
4	1 116				1 250				597	653	1 250		304	Metals and Castings			3 012		1 762			3 012			1 700			B	4
5	5 621				5 000				2 705	2 295	5 000		305	Small Tools			10 315		5 315			10 315			6 000			C	5
6	1 343				2 100	SJV 272		-350	645	755	1 400		306	Shop, Field & Engine Room Supplies			4 350		2 250			4 350			2 000			D	6
7	10 766				11 000				5 435	5 565	11 000		311	Aggregates & Other Building Materials			16 281		5 281			16 281			13 000			E	7
8													311	Waterproof Sealer - Swim Pools			1 040		1 040			1 040			1 040			F	8
9	11 971				12 000				6 655	5 345	12 000		312	Lumber & Millwork			20 566		8 566			20 566			14 000			G	9
10													312	Lumber for Signs			1 200		1 200			1 200			0			H	10
11	2 325				5 000					3 000	3 000		312	Tanbark			10 945		7 945			10 945			5 000			I	11
12	11 602				12 000				6 937	5 063	12 000		315	Miscellaneous Hardware			35 709		23 709			35 709			15 000			J	12
13													315	Tennis Rule Signs			625		625			625			0			K	13
14	7 345				8 000				4 005	3 995	8 000		316	Pipe & Plumbing Supplies			15 597		7 597			15 597			10 000			L	14
15	7 746				8 675				2 789	5 886	8 675		317	Electrical Supplies			15 697		7 022			15 697			11 500			M	15
16	4 944				6 000				2 885	3 115	6 000		318	Paint & Painters' Supplies			10 174		4 174			10 174			7 500			N	16
17	20				10				5	5	10		319	Explosives and Ammunition			75		65			75			10			O	17
18	26 225				25 750				13 029	12 721	25 750		321	Fuels & Lubricants (P)			35 000		9 250			35 000			28 150			P	18
19	7 960				10 000				7 117	6 795	13 912		331	Household & Institutional Supplies			15 000		5 000			15 000			12 000			Q	19
20	2 057				4 000					4 000	4 000		331	Garbage Cans					-4 000									R	20
21	8 585				8 000				3 103	3 250	6 353		335	Cleaning & Janitorial Supplies			10 079		2 079			10 079			8 000			S	21
22	2 996				3 000				1 526	1 474	3 000		340	Drygoods & Wearing Apparel (P)			3 965		965			3 965			3 500			T	22
23					760								353	Bottled Water			1 000		240			1 000			1 000			U	23
24	8 284				10 000				4 328	5 672	10 000		361	Drugs and Chemicals			15 969		5 969			15 969			11 000			V	24
25	1 360				1 100				710	390	1 100		362	Hospital Supplies			1 600		500			1 600			1 200			W	25
26	6 385				5 500				3 435	3 060	6 495		371	Stationery & Office Supplies			6 500		1 000			6 500			6 000			X	26
27	2 185				1 600				1 066	534	1 600		372	Photographic & Drafting Supplies			3 241		1 641			3 241			1 800			Y	27
28	1 799				1 700				662	1 038	1 700		375	Stationery Withdrawals from Stores (P)			2 400		700			2 400			1 800			Z	28
29	9 842				10 000				5 431	4 569	10 000		381	Horticultural Supplies			17 833		7 833			17 833			11 000			AA	29
30	30 192				25 500				13 378	12 122	25 500		391	Recreational Supplies			35 278		9 778			35 278			30 278			BB	30
31					2 500					2 500	2 500		391	Tournament Supplies			5 610		3 110			5 610			3 000			CC	31
32	3 754				2 000					2 000	2 000		391	Swim Suits (Replacements)			2 000					2 000			2 000				32
33	707				340				253	87	340		392	Music & Drama Supplies			500		160			500			400			DD	33
34																													34
35	188 272				189 285			-4 100	87 154	96 431	183 585		1.300	TOTAL MATERIALS & SUPPLIES			307 561		118 276			307 561			213 878				35

EXHIBIT No. 1 - Controller's Form No. 4250
DEPARTMENTAL BUDGET ESTIMATE OF PROPOSED EXPENDITURES
(Actual sheet size 17 X 24 inches)

THIS BUDGET ESTIMATE MUST BE FILED WITH THE CONTROLLER NOT LATER THAN FEBRUARY 1, 1960

RECOMMENDATIONS NOT REQUIRING
CHARTER REVISION -- NONE

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RECOMMENDATIONS REQUIRING
CHARTER REVISION

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RECOMMENDATIONS REQUIRING CHARTER REVISION

(Note -- To accomplish the following proposed changes, Charter revision will be necessary.)

ADOPT WORK PROGRAM BUDGETING

A complete change in the concept of budgeting is urgently needed; a Work Program type budget should replace the present Object of Expenditure budget.

Requests for budget funds should be expressed in dollars needed to accomplish specific end results rather than to buy certain commodities. These end results (Work Programs) should identify and describe the basic purposes for which departments, bureaus or divisions are established. This change will shift emphasis from men, materials and machines to the functions, activities and services the city government provides to its citizens.

By way of illustration, the Bureau of Building Repair of the Department of Public Works now requests funds under "Line" items such as Elevator Operators, Janitors, Carpenters, Allowance for Overtime, Wages-Supervisory, Recapping Tires, Carfare, Telephone, Towel Service, Paint, etc. There is little identification of the end purpose for which the funds are requested.

In contrast, a Work Program type budget presents expense requests in terms of activities such as: Provide Janitor Service for Public Buildings; Repair Elevators; Maintain lighting and electrical facilities; Maintain heating and ventilating systems; Repair roofs and drains; and Paint buildings. (The Charter now requires that "a separate schedule of the proposed work program" shall be included or accompany the budget. The Mayor's Office each year requests submission of budgets in work program form. Compliance is negligible.)

Format

The Work Program format consists of:

1. A description of the functions of a department, bureau or division.

2. A breakdown of such functions to individual Work Programs with applicable amounts for each program shown for the past years, together with the current requests, and the amounts of increases or decreases.

3. Work Program Statistics -- a compilation of selected performance units which, in general, support the increased or decreased activity -- the work load itself.

4. Short, pertinent explanatory notes as to basic reasons for the changes proposed. These explanatory notes should be limited, in the Budget Work Sheets, to changes in excess of $100 and, in the Summaries for administrative use, to changes in excess of $1,000. These notes should include all personnel and salary changes to advise all concerned as to the effect of the changes on this category of expense. It is not recommended that a separate schedule of existing and proposed positions and wage and salary rates accompany the summarized Work Program budget, as is done at present. The present practice in some departments of unauthorized listing of names of employees should be discontinued.

Capital Outlay

All Capital Outlay requests (Equipment and Projects) should be included as a separate Work Program for each budgeting unit. This will prevent distortion of trend records which would otherwise occur by occasional large purchases or by construction project costs. Each department budget form should be supported by a Capital Outlay Summary detailing Equipment and Work Projects. Equipment should include non-expendable items, generally over $50 in cost and having an estimated usefulness of three years or more. Work Projects should include unusually large items, i.e., purchase of land, building construction, etc. It should also include large repairs, maintenance, replacement and reconstruction jobs costing over $5,000. (This figure is recommended in the Purchasing Department section of the Committee's report to replace the present $2,000 limitation on contractual bidding procedure.)

Repair, Maintenance, Replacement and Reconstruction

All expenditures for single repair, maintenance, replacement and reconstruction jobs of $5,000 or less should be handled as Work Programs and segregated, in general, according to trade classifications and described as "Maintain Lighting and Electrical Facilities," "Paint Buildings," etc.

This treatment of general "upkeep" activities is considered superior to the present "Priority" systems under which known minor jobs are reviewed and classified in twelve categories. Many needs are unknown when the estimates are prepared, evidenced by requests for "Urgent and/or necessary unforeseen maintenance and repairs, based on past experiences." As a result, these lists of small itemized requests in the present budget are meaningless. It would be an improvement to base all minor work of this nature on past experience and to control amounts budgeted through trend records in each of the suggested Work Programs.

The relative urgency of maintenance jobs can better be determined currently as a part of manpower work program scheduling, than through priorities frequently established over a year in advance.

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For detailed recommendations and suggested forms refer to the Planning and Scheduling the Budget Change section.

SIZE OF BUDGET

The proposed budget forms should be letter-size with nine columns instead of the present original document measuring 17 by 24 inches with twenty-nine columns. The number of lines needed to present Work Program figures instead of Objects of Expenditures figures will be reduced about seventy-five percent.

The weight of the new summarized budget will be approximately one pound as compared to the one hundred thirty pounds for the present original and twenty-one pounds for the reduced version. (All budgets of the fourteen other cities and counties reviewed during this survey were produced on letter-size paper.)

The net effect of these changes will be the production of a usable instrument for the administration and control of municipal expenditures. It will be convenient to handle, portable for office use and for committee discussions, and will fit into a briefcase for home study, if desired.

BUDGET RELATIONSHIPS -- DEPARTMENT MANAGERS, MAYOR AND BOARD OF SUPERVISORS

To improve overall realization of budget objectives, changes are needed in the relationships now existing between the top echelons of city government. While authorization of the budget is properly legislative, the preparation, presentation, substantiation and administration of the budget are generally considered to be the responsibilities of the executive branch of the government, namely the Mayor. To retain to the greatest degree this division of responsibility, it is desirable that the following changes be made:

1. The budget should be fully accepted as "The Mayor's Budget". He alone should be held accountable for results.

2. The Mayor -- or his immediate representative -- should attend all budget meetings of the Board or of the Finance Committee to explain and support the requests he has previously approved.

3. The Board should advise the Mayor the reasons for their budget changes. In turn, the Mayor should forward this information to affected departments.

These changes will improve budget consideration and will remove some of the general dissatisfaction with present procedures.

BUDGET PUBLICATION

The present system involving special newspaper issues of the proposed budget and appropriation ordinances should be discontinued. The recommended Summarized Work Program budget, letter-size, will contain superior data and information for the public and should be reproduced in book or pamphlet form in sufficient quantities to permit widespread distribution to news media, libraries, schools, civic committees, associations and other groups.

This printed budget should be based on the Mayor's recommendations to the Board of Supervisors. This will give interested citizens an opportunity to secure advance information about budget plans and to present their views to the Board of Supervisors. As changes made by that body nominally affect only a small fraction of the total budget items, such changes might well be considered newsworthy and be published as news items. This procedure will give better information to interested citizens, and at the same time reduce city expense.

ADVANTAGES OF WORK PROGRAM BUDGETING

The advantages of a Work Program type budget are:

1. It will give department heads and other at supervisory levels an improved management tool, encouraging them to think and act in terms of planning and accomplishment. It will provide incentives and increase employee interest.

2. It will provide more meaningful information to the administrative and legislative branches of government. It will aid in policy formulation, development of extent and standards of service, priority of activities and authorization and control of expenditures. The reduction in size and content of the budget itself will improve the reviewing process and the quality of the decisions made.

3. The value of Work Programs to the public is hardly calculable. It is axiomatic that a municipal government's effectiveness and efficiency is in direct ratio to the interest displayed by citizens. Work Program budgeting will permit and promote this interest, and for the first time it will make it possible for the interested citizen to know what services are now being purchased and their cost, as well as the nature and the price of plans for new activities and expansions in existing programs.

"When budget information is presented in such a manner that citizens can understand it and discuss it intelligently, public hearings can be made an effective medium through which taxpayers may express their opinions about proposed financial programs and policies."

4. It will permit, with safety, considerable decentralization of authority to lower levels of management. Some studies show that delegation of budget responsibility is one of the most effective means of securing "Cost consciousness" among Supervisors. Participation in the budget process by supervisors can have far-reaching effects. It tends to make the thinking toward the budget positive rather than negative. It removes suspicions and misgivings. It fosters the idea that the budget is for management at all levels.

   The present procedure with Objects of Expenditures authorized by ordinance requires written approvals by the Chief Administrative Officer, Boards or Commissions and the Controller in order to make transfers between Objects of Expenditures even though the purpose for which the money is to be spent does not change. Such procedures cause much paper work which could be eliminated.

5. It will sharpen decision making at all levels.

6. It will greatly reduce the tremendous volume of detail necessary to itemize, describe and justify "line items."

ESTABLISH A BUDGET DEPARTMENT

It is recommended that an adequately staffed Budget Department be created. This department will be headed by a Budget Director reporting directly in a staff capacity to the Deputy Mayor. The primary responsibility of the Budget Department will be to maintain constant vigilance over all controllable costs of the city government through scheduled on-the-ground inspection of existing manpower, methods and all forms of expenses and through examination of proposed increases. Through this agency will be provided the necessary incentives to all departments for efficiency and economy. The Budget Department will design, install and co-ordinate the proposed Work Program budget, as only such specialized attention will produce maximum benefits.

The establishment and staffing of the Budget Department are the first moves necessary to the adoption of Work Program budgeting. The proposed organization of the Budget Department is illustrated in chart form in Exhibit 2. Class titles and position descriptions for the Director and staff with duties, minimum qualification, etc. are shown in Exhibits 3 to 6.

It will be noted that an adequately staffed Budget Department is recommended. To do the job which must be done to design and install the Work Program budget, to correct the conditions described herein and to realize the potential economies in present operations, it is vital not only that the staff be competent but it be numerically sufficient to conduct complete on-the-ground examinations of the full scope of city activities on a scheduled basis preferably every two or, at least, every three years.

The International City Managers Association suggests one such staff member for each 500 city employees, which ratio we recommend. School employees and others not within the jurisdiction of the Mayor and Board of Supervisors should not be included in this ratio -- unless such analytical service is extended to such organizations. Business corporations have found it profitable to use a ratio of one staff member to each 200 employees.

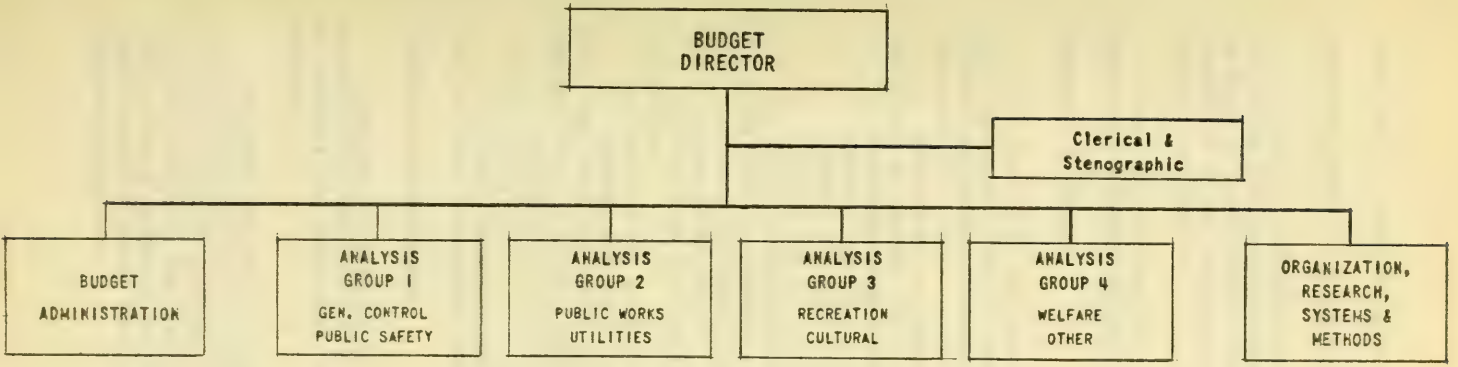
The recruitment, training and development of this staff must be done with great care and will, necessarily, consume considerable time before full effectiveness is realized.

A primary responsibility of the new Budget Department should be to produce realistic budgeting. Work Program budgets should be prepared on a factual basis. A strong and consistent effort to create cost consciousness and develop proper incentives should be developed in the Budget Department and supported by the Mayor. This effort should include posters, letters, talks to department heads and employees, suggestion plans inviting ideas for improvements in operations, safety, etc., contests, awards, and other incentives, all aimed at development of cost-mindedness and a general desire to improve efficiency.

A sustained effort should be made to eliminate inflation in departmental budget estimates. The spending of not needed budgeted amounts in order to insure the continuance of existing level of appropriations should be controlled. Examinations by and consultations with representatives of the Budget Department, through the year and particularly during budget preparation time, will generally provide the best assurance that regulations are observed, that requests are in order and, depending on availability of funds, will be approved.

The Budget Department will be best equipped and organizationally positioned to undertake the implementation and installation of approved changes resulting from recommendations by the Mayor's Committee. Without interpretation, coordination and assistance by such an agency many valuable sources of potential economy could easily be delayed or subverted.

ORGANIZATION CHART - BUDGET DEPARTMENT



DUTIES

Design & Improve Budget Form and Procedure

Establish Work Programs and Statistics

Evaluate Budget Execution

DUTIES

Make Administrative Studies.

Analyze operating expense, including on-the-ground studies of manpower, classifications, compensations, motor and other equipment, space, forms, work methods, work flow and other costs.

Recommend needed improvements.

Study revenue potentialities.

Study and evaluate recommended capital improvements.

Develop cost incentive activities.

Assist and advise in budget preparation - (Amounts requested, needed supporting material and explanation).

Review work programs and assist in improving utility.

Analyze supplements to budget.

DUTIES

Study City Organizational structure, need for existing or additional Dept., Divisions, etc.

Analyze Authority Delegation, Responsibility and Communications.

Coordinate Cost and Systems & Methods Subjects with other Departments.

Keep abreast of improved procedures in other jurisdictions and study for application in San Francisco.

EXHIBIT 2

EXHIBIT III

CLASS TITLE: BUDGET DIRECTOR CODE:

CHARACTERISTICS OF THE CLASS:

Subject to top management approval, is responsible for initiating, developing and coordinating programs, plans and policies with respect to budgets, organization, manpower, cost control, management and procedures of all departments of the City government within the Mayor's jurisdiction.

Makes regular important contacts with top-level City officials; supervises subordinate personnel.

EXAMPLES OF DUTIES:

1. Supervises and approves design and improvement of budget form and procedures. Provides assistance and advice in budget preparation (respecting amounts requested, needed supporting material and explanation).
2. Supervises and approves work program classifications and statistics to improve their utility.
3. Evaluates budget execution.
4. Reviews and makes recommendations on capital improvements.
5. Reviews and makes recommendations on supplements to budgets.
6. Reviews and makes recommendations on administrative studies.
7. Makes recommendations on the implementation of studies on operating expense, including manpower, classifications, compensations, motor and other equipment, space requirements, forms, work methods, work flow and other costs.
8. Initiates and implements development of cost incentive activities.
9. Reviews and makes recommendations on revenue potentialities.
10. Reviews and makes recommendations on City organization structure, need for existing or additional departments, divisions, bureaus, etc., authority delegation, responsibility and communications.
11. Coordinates with other departments such subjects as costs, systems and methods.
12. Keeps abreast of improved procedures in other jurisdictions and initiates appropriate application in San Francisco.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university course, with a baccalaureate degree in public or business administration, accounting, finance or industrial engineering.

Requires ten years of progressively responsible experience in municipal finance and accounting, including experience in management and organizational problems at a responsible management level, or related equivalent experience in private industry, or an equivalent combination of training and experience. A master's degree in the specified major course work may be substituted for two years of the required experience.

CLASS TITLE: BUDGET DIRECTOR CODE:

Knowledge, Abilities and Skills: Requires comprehensive knowledge of the principles and techniques of financial accounting, budgeting, administration and management, modern office methods and procedures, personnel management, the application of statistical methods to management problems.

Requires unusual ability to initiate, plan and analyze the study of complex management problems; ability to supervise and delegate to subordinate personnel; unusual ability to deal courteously and effectively with others at all levels in complex and controversial situations; unusual creative, initiative and analytical abilities.

CLASS TITLE: SENIOR BUDGET ANALYST CODE:

CHARACTERISTICS OF THE CLASS:

Under general administrative direction of Budget Director, supervises an Analysis Group unit; providing technical and professional guidance and coordination for a major area of the work of the Budget Director's office, as assigned. Subject to Budget Director's general direction and approval, determines scope of study, assigns work to subordinate personnel, reviews results and coordinates with other Analysis Groups.

Makes studies and submits recommendations with respect to budgets, organization, manpower, cost control, management and procedures of assigned City departments and assists in budget development, preparation and processing. Makes regular important contacts with City officials with respect to budgeting, administrative and management matters; supervises subordinate personnel; performs related duties as required by Budget Director.

EXAMPLES OF DUTIES: (as assigned)

1. Design and improve budget form and procedure.
2. Establish work programs and statistics.
3. Evaluate budget execution.
4. Make administrative studies.
5. Analyze operating expense, including manpower, classifications, compensations, motor and other equipment, space, forms, work methods, work flow and other costs. Study need to fill vacated positions.
6. Study and evaluate recommended capital improvements.
7. Develops cost incentive activities.
8. Assist and advise in budget preparation - (amounts requested, needed supporting material and explanation).
9. Review work programs and assist in improving utility.
10. Analyze supplements to budgets.
11. Study revenue potentialities.
12. Study City organization structure, need for existing or additional departments, divisions, bureaus, etc.
13. Analyze authority delegation, responsibility and communications.
14. Coordinate cost, systems and methods subjects with other departments.
15. Keep abreast of improved procedures in other jurisdictions and study for application in San Francisco.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university course, with a baccalaureate degree in public or business administration, accounting, finance or industrial engineering.

CLASS TITLE: SENIOR BUDGET ANALYST CODE:

Requires six years of progressively responsible experience in municipal finance and accounting, including experience in management and organizational problems at a responsible supervisory level, or related equivalent experience in private industry, or an equivalent combination of training and experience. A master's degree in the specified major course work may be substituted for two years of the required experience.

Knowledge, Abilities and Skills: Requires thorough knowledge of the principles and techniques of financial accounting, budgeting, administration and management, modern office methods and procedures, the application of statistical methods to management problems.

Requires ability to plan, assign and supervise the activities of subordinate personnel; to edit, revise and prepare clear and concise reports; to investigate and analyze complex administrative, management and budgeting problems; to work well and effectively with others.

Recommended Selection Procedure:

The examination will consist of two parts, weighted 50% on written test and 50% on personal interview. Only those candidates who qualify in the written test will be called for the personal interview. Candidates must earn a score of 70% on each part of the examination in order to have their names appear on the eligible list. The personal interview will evaluate the background and personal qualifications of the candidates. Final selection will be made by the Budget Director from the three highest candidates on the eligible list.

Recommended Salary Range:

Recommended salary range for the calibre of personnel required for the position is $10,000 to $12,000 per year.

PROMOTIVE LINES:

From: Budget Analyst

CLASS TITLE: BUDGET ANALYST CODE:

CHARACTERISTICS OF THE CLASS:

Under direction, is responsible for performing difficult and detailed technical and professional work in making independent studies and analyses with respect to budgets, organization, manpower, cost control, management and procedures of assigned City departments and assists in budget development, preparation and processing. Makes regular contacts with City officials with respect to budgeting, administrative and management matters; may supervise the work of subordinate personnel; performs related duties as required.

EXAMPLES OF DUTIES:

1. Assists Senior Budget Analyst in developing work programs and work program statistics.
2. Develops cost standards for various operations.
3. Assists Senior Budget Analyst in study and evaluation of recommended capital improvements.
4. Under general direction of Senior Budget Analyst, conducts studies of City organization structure, need for existing or additional departments, divisions, bureaus, etc.
5. Assists Senior Budget Analyst generally in his duties, as directed.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university course, with a baccalaureate degree in public or business administration, accounting, finance or industrial engineering.

Requires fours years of progressively responsible exp[illegible]e in municipal finance and accounting, including experience in management and organizational problems at a responsible level, or related equivalent experience in private industry, or an equivalent combination of training and experience. A master's degree in the specified major course work may be substituted for two years of the required experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: the principles and techniques of financial accounting, budgeting, administration and management; knowledge of modern methods of personnel management, modern office methods and procedures, the application of statistical methods to management problems.

Requires ability to investigate and analyze complex administrative and budgetary problems; to deal effectively, courteously and successfully with City officials; to write clear and concise reports.

CLASS TITLE: BUDGET ANALYST CODE:

Recommended Selection Procedure:

The examination will consist of two parts, weighted 50% on written test and 50% on personal interview. Only those candidates who qualify in the written test will be called for the personal interview. Candidates must earn a score of 70% on each part of the examination in order to have their names appear on the eligible list. The personal interview will evaluate the background and personal qualifications of the candidates. Final selection will be made by the Budget Director from the three highest candidates on the eligible list.

Recommended Salary Range: $7,800 - $9,600 per year.

PROMOTIVE LINES:

To: Senior Budget Analyst
From: Junior Budget Analyst

CLASS TITLE: JUNIOR BUDGET ANALYST CODE:

CHARACTERISTICS OF THE CLASS:

Under supervision, assists with and performs routine technical and professional work involving studies and analyses with respect to budgets, organization, manpower, cost control, management and procedures of City departments and assists in budget development, preparation and processing. Makes reguler contacts with personnel of various City departments; gathers and prepares financial and technical data in connection with such studies; performs related duties as required.

EXAMPLES OF DUTIES:

1. Gathers pertinent information for developing work programs.
2. Develops organization and flow charts.
3. Does field work in connection with management and operational studies.
4. Assists assigned City departments in preparing budgets.
5. Analyzes operating expense for developing operational cost standards.
6. Assists Budget Analysts and Senior Budget Analysts generally in their duties as directed.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university course, with a baccalaureate degree in public or business administration, accounting, finance or industrial engineering.

Requires two years of experience in municipal finance and accounting or related experience in private industry, or an equivalent combination of training and experience. A master's degree in the specified major course work may be substituted for the two years of required experience.

Knowledge, Abilities and Skills: Requires knowledge of the principles and techniques of financial accounting, budgeting, administration and management, personnel management, office methods and procedures, application of statistical methods.

Requires ability to write clear and concise routine reports, to meet and deal successfully with other people; requires analytical research ability.

CLASS TITLE: JUNIOR BUDGET ANALYST CODE:

Recommended Selection Procedure:

The examination will consist of two parts, weighted 50% on written test and 50% on personal interview. Only those candidates who qualify in the written test will be called for the personal interview. Candidates must earn a score of 70% on each part of the examination in order to have their names appear on the eligible list. The personal interview will evaluate the background and personal qualifications of the candidates. Final selection will be made by the Budget Director from the three highest candidates on the eligible list.

Recommended Salary Range: $6,000 -- $7,200 per year.

PROMOTIVE LINES:

To: Budget Analyst
From: Original Entrance Examination

PLANNING AND SCHEDULING THE BUDGET CHANGE

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Design Forms and Procedures..... 22

Develop Departmental Work Programs and Install System..... 23

Provide Cost Accounting..... 23

PLANNING AND SCHEDULING THE BUDGET CHANGE

DESIGN FORMS AND PROCEDURES

The Budget Director, in cooperation with the Controller, should design budget forms and develop the procedures.

Studies developed no evidence of the existence in this country of an approved or generally accepted standard design or set of procedures for Work Program budgeting. Of the many city and county Work Program budgets examined during this survey, no two were alike. Conditions and problems vary, as do the concepts of the principals involved. Some suggestions are presented herein to demonstrate principles. The treatment favored herein is more similar to that followed in Detroit than to any other jurisdiction. It also conforms in principle to recent recommendations of the New York State Commission on Governmental Operations of the City of New York. In this connection it is of interest to note that Work Program-type budgets (described as "Activity", "Performance", or "Functional" depending on variances in design or terminology) are in use in New York City, Philadelphia, Chicago, Detroit, Cincinnati, Buffalo, Los Angeles and San Diego. Studies of Work Program budgeting are planned or are in process in Oakland, Milwaukee, Baltimore and New Orleans.

Some cities through activity budgeting have been able to reduce their number of object classifications to ten or twelve items, such as salaries and wages, utilities, rent, contracted maintenance and repairs, office supplies, gas, oil and grease, operating materials, small tools, fixed charges, other expense and capital outlay. Any control lost through reducing the details required is more than offset by the improved control gained in Work Program budgeting.

It is a primary requisite that the budget forms be designed to permit most effective use by department managers, the Mayor, the Board of Supervisors and the general public. In the initial compilation of any budget it is necessary to itemize expenses by Object of Expenditure, but because the tremendous volume of detail impedes administrative review, this data should neither be a part of nor should it accompany the Summarized Budget presented to the Mayor and Board of Supervisors.

Only in this way will it be possible for busy executives and citizens to absorb and understand the purpose and justification of the many and varied budget requests.

At present the following detail is supplied, as applicable for each of 124 budgeting units.

Personal Services - 20 sub-segregations
Contractual Services - 53 sub-segregations
Material and Supplies - 34 sub-segregations
Equipment - each item is detailed.

Exhibits 7, 8 and 9 are suggested work sheets for Work Program budgeting. Exhibits 10, 11 and 12 are summary forms for administrative use. The recapitulation from work sheets to summarized forms should be done on tabulating equipment.

Punched cards should also produce such Object of Expenditure data as may be required for Civil Service purposes, allotments, encumbrance or fund control.

An effort should be made to simplify control procedures by appropriating funds for each Work Program and using these appropriations for apportionment during the year and against which all types of encumbering charges should be entered. This process would greatly reduce the number of ledger accounts now carried and simplify the accounting work to be done.

DEVELOP DEPARTMENTAL WORK PROGRAMS AND INSTALL SYSTEM

A Work Program is an important, distinct and separable part of the total activity of a department, bureau or division. It should be sufficiently large to warrant separate budget treatment and to justify cost accounting segregation. It should be headed by the individual responsible for accomplishment of the end result.

Work Programs should be developed in a manner to assure uniformity in design and to accomplish the most informative segregations with the least cost. At the time the Work Programs are determined, agreement should also be reached on the supporting statistics needed and the general types and volume of descriptive material to be submitted in justification of changes.

The magnitude of the proposed change from Object of Expenditure to Work Program budgeting should not be underestimated. The Budget Department staff will have to be selected and trained. Much research, experimental and educational work will have to be done to effect the transition without loss of expenditure control. Departments should be converted only with the assistance of the experienced analysts of the Budget Department, with the change-over completed within two to five years.

It is recommended that installation be phased progressively, to work out problems as they develop. During the early stages of this program it may be necessary to operate both systems.

PROVIDE COST ACCOUNTING

A parallel cost accounting procedure should be established to compare actual expenditures for each Work Program with approved budgets and to provide information to management for control purposes.

BUDGET FORM 3 - TENTATIVE

DEPARTMENT, BOARD OR COMMISSION CONTROLLER BUDGET WORK SHEET

WORK PROGRAM Provide Tabulating Services WP NUMBER 1005

CODE	ITEM	PRIOR YEAR ACTUAL 59/60	CURRENT FISCAL YEAR BUDGET 60/61	CURRENT FISCAL YEAR PROBABLE EXPENDITURE 60/61	NEXT FISCAL YEAR REQUEST 61/62	NEXT FISCAL YEAR INCREASE OR DECREASE
1	2	3	4	5	6	7
110	Permanent Salaries	216,528	227,031	245,696	244,056	17,025
111	Overtime				1,250	1,250
120	Temporary Salaries				690	690
202	Freight & Misc. Charges		300	300		-300
218	Mtcd.& Rep.Office Equipment	950	1,000	1,000	1,150	150
232	Telephone & Telegraph	350	325	325	350	25
233	Postage	1,100	1,700	1,700	1,700	--
234	Printing, Bookbinding, etc.	1,610	1,815	1,815	2,000	185
241	Rental of Equipment	49,145	53,958	53,958	57,726	3,768
371	Stationery Office Supplies	11,700	11,500	11,500	12,000	500
375	Stationery Withdrawals	50	50	50	50	--
	WORK PROGRAM TOTALS $	281,433	297,679	316,344	320,972	23,293

EXHIBIT 7

All sample entries are hypothetical

WORK PROGRAM STATISTICS	ACTUAL 57/58	ACTUAL 58/59	ACTUAL 59/60	ESTIMATED 60/61	ESTIMATED 61/62
Number of permanent City employees	20,447	20,854	20,935	21,056	21,856
Number of warrants issued	948,000	990,000	960,000	962,000	996,000

CODE	EXPLANATION OF MAJOR INCREASES AND DECREASES SHOWN IN COLUMN 7 -
110	$17,025 reflects increases dur under Sec. IX Salary Standardization Ord. and the addition of one B10 Acct. III and two B310 Tab Mach Operators approved by Ord. 19-61 necessitated by establishing a shift basis for handling the expanded Social Security Program
111	$1,250 overtime estimated necessary during budget revision
120	$690 Temporary salaries needed during budget revision
218	$150 due to higher cost for existing services
234	$185 due to higher cost for existing services
241	$3,768 reflects increase in rental rate for tabulating equipment necessitated by expanded Social Security Program
371	$500 increase for tab cards and forms necessitated by expanded Social Security Program

SUBMITTED BY MANAGER GENERAL MANAGER

EPARTMENT, BOARD OR COMMISSION CONTROLLER

CAPITAL OUTLAY DETAIL

WP 1005)

ORK PROGRAM Capital Outlay -- (Provide Tabulating Services-- WP NUMBER 2001

CODE	EQUIPMENT AND WORK PROJECTS	PURCHASER'S INV NUM OR SERIAL NUM	ESTIMATED COST INCLUDING INSTALLATION	ESTIMATED TRADE IN OR SALVAGE VALUES	REQUEST 61/62 NET AMOUNT	REFER LINE NUM BELOW
1	2	3	4	5	6	
	EQUIPMENT REP					
402	Posture Chair	4064	50	10	40	1
402	Posture Chair	4065	50	10	40	1
402	Posture Chair	4066	50	10	40	1
402	Posture Chair	4088	50	10	40	1
402	Posture Chair	4089	50	10	40	1
402	Posture Chair	4090	50	10	40	1
402	Posture Chair	4091	50	10	40	1
	CAPITAL OUTLAY TOTALS $		350	70	280	

EXHIBIT 8

All sample entries are hypothetical

EXPLANATIONS OF REPLACEMENTS AND JUSTIFICATION OF NEW ITEMS OR PROJECTS -

Posture chairs are to replace old style swivel chairs with tilting and swivel mechanisms worn beyond a point of practicable repair.

BMITTED B MANAGER GENERAL MANAGER

T FORM 5-TENTATIVE

IMENT, BOARD OR COMMISSION CONTROLLER

PERMANENT SALARIES DETAIL

PROGRAM Provide Tabulating Services WP NUMBER 1005

RY ANCE ITEM	CIVIL SERVICE CLASS	CLASS TITLE	ACTUAL NO. OF EMPL. 59/60	BUDGET FY 60/61 NUM OF EMPL	RATE	REQUEST FY 61/62 NUM OF EMPL	AMOUNT	NUM OF EMPL +-OR-
2	3	4	5	6	7	8	9	10
		110 PERMANENT SALARIES						
46	B 4	Accountant I	5	5	447-543	5	32,205	
47	B 6	Accountant II	2	2	530-644	2	15,456	
48	B 10	Accountant III	2	2	613-745	3	25,431	1
49	B 14	Senior Accountant	2	2	728-884	2	20,796	
50	B 16	Supervising Accountant	1	1	862-1047	1	12,564	
51	B 210	Office Assistant	1	1	268-325	1	3,570	
52	B 222	General Clerk	2	2	341-415	2	9,511	
53	B 234	Head Clerk	1	1	518-628	1	7,536	
54	B 308	Calculating Mach. Oper.	6	6	341-415	6	29,740	
55	B 309	Key Punch Oper. IBM	6	6	333-405	6	28,794	
56	B 310	Tab. Machine Oper. IBM	6	6	358-436	8	40,752	2
57	B 3101	Sr. Tab. Mach. Oper. IBM	2	2	458-556	2	12,721	
58	B 512	General Clerk Typist	1	1	341-415	1	4,980	
		PERMANENT SALARIES TOTALS	37	37		40	244,056	3

EXHIBIT 9

All sample entries are hypothetical

BUREAU OR DIVISION _____ PAGE NO. 1 OF 2

FUNCTION - Controls accounting, disbursement and transfer of funds. Maintains accounts for all transactions affecting the qcquisition, custody or disposition of values. Conducts departmental audits and prepares financial and statistical reports.

BINDING MARGIN

LINE NUMBER	CODE	WORK PROGRAM SUMMARY	FY 1959-60 ACTUAL EXPENDITURES	FISCAL YEAR 1960-61 BUDGET	FISCAL YEAR 1960-61 PROBABLE EXPENDITURES	FISCAL YEAR 1961-1962 BUDGET REQUEST	FISCAL YEAR 1961-1962 INCREASE (DECREASE)	FISCAL YEAR 1961-1962 RECOMMENDED BY MAYOR	FISCAL YEAR 1961-1962 ADOPTED BY BOARD OF SUPERVISORS
	1	2	3	4	5	6	7	8	9
1	1001	Administrative & Secretarial	100,113	98,762	98,627	99,006	244		
2	1002	Controlling Budget Accounts	333,224	383,400	383,400	387,620	4,220		
3	1003	Maintain Accts. & Prepare	103,161	117,157	117,157	117,662	505		
4		Reports							
5	1004	Conduct General and	217,614	230,813	230,813	236,363	5,550		
6		Utility Audits							
7	*1005	Provide Tabulating Services	281,433	297,679	316,344	320,972	23,293		
8	**2001	Capital Outlay	7,555	3,569	3,569	3,380	-189		
9									
10		Total Work Programs	1,043,100	1,131,380	1,149,910	1,165,003	33,623		
11									
12		SPECIAL FUNDS ADMINISTERED							
13		BY THE CONTROLLER							
14	804	Judgments and Claims	102,740	75,000	75,000	75,000	--		
15	853	Assess Bay Area Air Pol.Contr.	130,745	135,231	135,231	135,231	--		
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30		TOTALS $	1,276,585	1,341,611	1,360,141	1,375,234	33,623		

EXHIBIT 10

All sample entries are hypothetical

* In this exhibit only Code 1005 Provide Tabulating Services is explained.

** Capital Outlay is treated separately so as not to distort figures in other Work Programs

TENTATIVE BUDGET FORM 1

SUBMITTED BY _____

DEPT., BOARD OR COMMISSION

BUREAU OR DIVISION

	WORK PROGRAM STATISTICS	ACTUAL 1957-58	ACTUAL 1958-59	ACTUAL 1959-60	ESTIMATED 1960-61	ESTIMATED 1961-62
*	Number of permanent City employees	20,447	20,854	20,935	21,056	21,856
	Number of budget accounts maintained	1,910	1,955	1,980	2,026	2,050
	Man-days of general and utility audits	5,300	5,350	5,350	5,500	5,550
*	Number of warrants issued	948,000	990,000	960,000	962,000	996,000
	Supplemental appropriations processed	325	400	475	450	450
	"Requests" for transfer, allocation, allotment or release of reserves accomplished	1,510	1,750	1,700	2,100	2,200

CODE	WORK PROGRAM INFORMATION - EXPLANATION OF MAJOR INCREASES AND DECREASES
1005	$23,293 reflects increase in Personal Services of $18,965 of which $2,258 is due to seniority increments under provisions of Sal. Stand. Ord. $16,707 reflects the addition of three positions created by Ord. 19-61 necessitated by an expanded Social Security Program.

EXHIBIT II

All sample entries are hypothetical

*In this exhibit only Code 1005 Provide Tabulating Services is explained.

BINDING MARGIN

TENTATIVE
BUDGET FORM 1A

BUREAU OR DIVISION _____ PAGE NO. 2 OF 2

LINE NUMBER	CODE	SUMMARY EQUIPMENT AND WORK PROJECTS		BUDGET REQUEST	RECOMMENDED BY MAYOR	ADOPTED BY BOARD OF SUPERVISORS
1		EQUIPMENT				
2	*402	Posture Chairs, 17 @ $40, 4 @ $50	REP	880		
3		Replacement of posture chairs is in accordance with approved				
4		schedule and standards. Survey of Nov. 1, 1960 confirms				
5		replacement is in order.				
6	402	Fireproof Ledger Trays, 8 @ $100	REP	800		
7	402	Adding Machines, 10 Key, 4 @ $350	REP	1,400		
8						
9	402	Typewriter Stands, 3 @ $50	NEW	150		
10	402	Copyholders, 3 @ $50	NEW	150		
11						
12		TOTAL EQUIPMENT	$	3,380		
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26		EXHIBIT 12				
27						
28		All sample entries				
29		are hypothetical				
30						
31						
32		*In this exhibit only Code 1005 Provide Tabulating Services is explained				
33						
34						
35						
36						
37		TOTALS	$	3,380		

BINDING MARGIN

TENTATIVE
BUDGET FORM 2

SUBMITTED BY _____

SAVINGS

SAVINGS

A survey of the time spent by all departments (except School) in preparing and assembling the annual budget, produced a total of 65,000 man-hours, involving a labor cost of $260,000; to this is added - publishing in newspaper $30,000; printing and reproduction $11,000; total preparation cost $301,000.

An additional 73,800 hours, costing $294,000, were estimated to have been spent in the use of the budget, comparing it with the expenditures and preparing transfer and supplementary requests.

As the time spent in Work Program budgeting, it is estimated, will be offset by reduction in the Object of Expenditure detail needed, no material change in cost of preparation is anticipated.

The effect of the Work Program budget plan, as a whole, including the scheduled surveying of existing costs and previewing of budget requests by Budget Department analysts, will uncover savings of very substantial proportions. Based on the results of pilot-type studies of the city organizations made by this Committee, it is estimated that an annual saving of five percent of the total budget (other than that of the School Department) can be made, resulting in a reduction of approximately $10,000,000 annually.

(In a private corporation, with similar findings, it would not be difficult to realize a ten percent saving, but the lower figure of five percent is used here because part of the potential economies have already been developed elsewhere in the Committee's report and because conditions within municipal governments limit full realization of potential economies. Many "pressure groups", department and bureau heads and others motivated by special interests, can be expected to resist reductions. It should be pointed out that, in many instances, these same groups were responsible for initiating and creating the financial problems and excesses which now exist. However, with full administrative support, savings may greatly exceed this five percent estimate.)

A

REPORT

WITH RECOMMENDATIONS

CONCERNING THE ACTIVITIES

OF THE CIVIL SERVICE COMMISSION

OF THE CITY AND COUNTY

OF SAN FRANCISCO

BY THE

WAGE & SALARY ADMINISTRATION

TASK FORCE OF THE MAYOR'S

COMMITTEE FOR MUNICIPAL MANAGEMENT

MAY 1960

[illegible]STION OF SUPERVISORS

May, [illegible]

Marshall G. Mustain
Project Director
Mayor's Committee for Municipal Management
San Francisco, California

Dear Mr. Mustain:

The Wage and Salary Administration Task Force has completed an intensive five-month study of San Francisco civil service policies and practices. We believe the attached report will reveal significant areas for improvement.

The conclusions and recommendations contained therein are the result of study and debate by the Task Force and its Advisory Committee composed of experts in the salary administration field and of advice and counsel from other Task Forces which relayed to us the effects of current civil service practices on the operating departments contacted. In addition, we interviewed management officials of several major city departments; discussed our findings with city employees; attended each meeting of the Civil Service Commission during four months; studied Grand Jury reports, writings of leading authorities, union and other employee association newsletters; and analyzed the results of studies made by citizen groups in other public jurisdictions in an attempt to develop reasons for a strengthening of San Francisco's policies and practices in this field.

We believe therefore that this report is authoritative and factual.

It is the conclusion of most students of the civil service system that its role of reducing political patronage as a factor in filling jobs has been largely accomplished. The Task Force agrees with this conclusion as far as San Francisco is concerned. The trend of changes in the administration of its civil service system has in recent years been in the right direction. As a result, San Francisco is better equipped to deal with its current problems than it would have been, had not the improvements taken place. However, much more progress is necessary if a positive personnel program is to be developed.

The improvements we feel are necessary to accomplish this are the subject of this Task Force's report.

May we take this opportunity to express our appreciation for the excellent cooperation received from the Civil Service Commission, its staff, and other city employees in making available to us, freely and without hesitation whatever information was requested.

C. J. Bocchieri
Chairman

[illegible]

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I	Present Civil Service System	[illegible]
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III	Recommendations on Wage and Salary Administration	[illegible]
IV	Recommendations on Reorganization of the Civil Service Function	[illegible]
V	Savings	[illegible]

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SECTION	EXHIBIT NO.	TITLE
I	I	Organization Chart Present Civil Service.....
II	II	Count of Unfilled Permanent Positions
	II-A	Count of Unfilled Temporary Positions
	III	Illustration of Use of Various Appointment Categories.....
	IV	Comparison of Trade & Craft Rates of Pay.....
	V	Comparison of Miscellaenous Employees Rates of Pay.....
	VI	Type and Frequency of Matters considered By The Civil Service Commission.....
III	VII	Salary Plan for Clerical & Technical Family of Jobs..... Example A..... Example B.....
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	X	Salary Plan for Police & Firemen.....
	XI	Salary Plan for Streetcar & Bus Operators.....
IV	XII	Organization Chart Proposed Personnel Department.....

S U M M A R Y

SUMMARY

The Wage and Salary Administration Task Force was charged with the responsibility of reviewing and evaluating San Francisco wage and salary policies, procedures, and administration, and with recommending action to simplify, streamline, and effect economies in this activity.

The over-all project was divided into two major objectives: (1) to develop a better system for determining the compensation of city employees and (2) to reorganize present activities and provide for new activities which would improve procedures for recruiting, developing, placing, promoting, and retaining employees.

SALARY ADMINISTRATION

As is general with any industry, a basic philosophy has to be adopted so as to define the city's competition in the labor market. We believe the City and County of San Francisco should compete with all other employers of equivalent stature.

In the non-management level, the majority of city jobs are very similar to those in local private industry. It is also apparent that many jobs in city service, particularly at the management level, are unique to public jurisdictions and therefore have little or no comparability in private employment.

As a result of this thinking, we adopted two basic principles: (1) for non-management jobs the city employees' earnings should equal the earnings of employees in local private industry whenever possible and (2) for management jobs, the rates of pay should equal the rates of other public jurisdictions, except possibly those in the professional ranks where private employment data is more comparable.

All city jobs were grouped into "families," i.e., jobs with the same general characteristics, and our basic principles were applied to each "family" with the following results:

Clerical and Technical: The result of equating earnings of city employees with the earnings of employees in private industry would save $4,000,000.

Trades and Crafts: The result of a similar equation of pay would save $2,500,000.

Municipal Railway Operators: The result of equating earnings with similar jobs in the larger California cities would save $500,000.

Police and Firemen: The result of equating earnings of San Francisco employees with earnings of similar jobs in other California jurisdictions would save $800,000.

Management: Rates for these jobs should generally be equated to those of other public jurisdictions. No estimate of savings could be made because available earnings data was inconclusive.

ORGANIZATION OF A PERSONNEL DEPARTMENT

In this phase of our study, our basic philosophy was that personnel administration should be an active and integral part of top management. Our goal therefore, was to provide the machinery for developing over-all personnel policies and for giving direction and guidance to sound personnel administration practices in the operating departments.

In order to implement this goal, our proposal establishes a Personnel Department which would act in a staff capacity to top management.

In addition to Wage and Salary Administration, this department's major function is to keep abreast of the broad personnel activities of the city-county government. It is to act as spokesman for management on personnel problems. It should perform the necessary objective research and recommend establishment of broad personnel programs. Records and reports of the current status of the total force of city employees are to be maintained to provide top management with facts and trends. And it should be continually aware of the status of employee morale, reporting to management any problems which would adversely affect good morale.

The intangible nature of the results to be obtained by organizing a Personnel Department does not lend itself to estimating in dollars whatever savings are achieved. However, a sound personnel program will be the basis for employee good will and enthusiasm, and will create a spirit of cooperation that can save the city substantial sums in greater efficiency and work production.

CONCLUSIONS

Based on the philosophies stated above, the Task Force's conclusions can be summarized in four major recommendations:

1. The city should pay salaries based on the average earnings for like positions in San Francisco industry or, when positions are unique to the public service, in other comparable public jurisdictions in California.

Our studies reveal that average earnings of city employees are somewhat higher than the average earnings of industry for comparable positions. The principal causes are: The method of interpreting the "generally prevailing rate," the archaic practice of basing salaries for individual positions on data obtained in surveying each of the city jobs, and the basically different pay policies for major groups of employees. Our proposal is to apply one fundamental policy to all families of city-county jobs.

2. The procedure for recruiting employees should be faster and more flexible.

The present system assumes that there is an abundant supply of applicants, eager for city service and available for employment at the city's convenience. Our study indicates that this system has proved unreliable and unsuccessful. Instead of waiting for applicants to "sign up", the city should pursue a vigorous program of procurement and should amend its rules to permit use of judgment in measuring the qualifications of applicants.

3. A planned and purposeful program to develop future management employees is essential if the city is to continue giving the best service possible to its residents.

Under the lack of any systematized program for development of management personnel, the career city employee must take steps on his own to solve the problem of progression. He must decide which jobs he thinks he can fill, then watch for and take the promotional examinations. Rather, the city should accept the responsibility of insuring that the right man is assigned to the right job at each step of the promotional ladder so that the top administrative jobs can be filled by well-trained, highly qualified individuals.

4. An employee relations program is needed to develop in each city employee a feeling of identification with top management in administering the city's affairs.

The present organizational concept of city government restricts top management's knowledge of the individual employee and of his collective feeling about his employer, the taxpayers. Organizing a Personnel Department which will be actively interested in the employee's viewpoint will overcome this important deficiency. Our proposal on this point is to provide channels of communication to permit exchange of viewpoints between top management and the employee. We believe this will result in a better understanding by the employee of over-all management policies and goals, thus making a vital contribution to the unity of purpose necessary for successful city government.

- -

It is recognized that implementing each of these recommendations would be a major undertaking requiring several years before being made effective. We are also keenly conscious that these activities are closely inter-related. Because it will take a great deal of effort and time to establish an over-all personnel program we recommend that the Wage and Salary Administration proposal be implemented first. This activity is basic and must precede the others in developing the overall program.

Wage and Salary Administration Task Force

C. J. Bocchieri, Chairman
Homer H. Starr

Advisory Committee on Wage & Salary Administration
(Deliberations confined to salary administration)

R. S. Hunsinger

Harry McKnight

J. E. Newstrom

George Treat

W. R. Willard

Research Analyst

Raymond A. Melinge

2

PRESENT
CIVIL SERVICE SYSTEM

A BRIEF HISTORY OF THE SYSTEM IN SAN FRANCISCO FROM 1850 TO THE PRESENT.

A SUMMARY OF THE RESPONSIBILITIES AND ACTIVITIES OF THE CIVIL SERVICE COMMISSION AND STAFF AS CURRENTLY CONSTITUTED.

I. PRESENT CIVIL SERVICE SYSTEM

In the early days of San Francisco Government, the Vigilance Committee was instrumental in having the Consolidation Act of 1856 adopted to curtail extravagance in city government and to restrict the effects of a spoils system out of which came payroll padding, contract graft, bribery, straight-out embezzlement, and position graft.

On May 26, 1898 a new City Charter was adopted. Among other things it required that certain positions be brought under a civil service system that would eliminate political patronage as the influencing factor in selection of employees for the positions in question. Essentially, the controls provided by this system were:

1 - Open, competitive examinations for selection of employees.

2 - Limitation of the power of political office holders to remove or dismiss employees.

3 - Elimination of the practice of assessments on the incumbents for political funds.

In 1931, the present charter was adopted. It extended civil service to all city jobs exempting only a small number of specific positions. It also centralized wage and salary administration by making mandatory upon the Board of Supervisors the standardization of compensation. The effect was that the city's department heads could no longer pay salaries as they chose for jobs in their departments. Under this centralized function, jobs doing like work would get like pay, regardless of which department the work was performed in.

Working under the provisions of the 1931 charter, the city has established a civil service system that essentially provides for: (1) a 3-man commission and staff independent of other city departments to administer civil service, (2) selection of employees by open examination, (3) a probationary period before permanent assignment to a position, (4) prohibition from political activity.

Civil Service Commission

The Commission is composed of 3 members, appointed by the Mayor for a term of six years, with a new appointment every two years. It is responsible for providing qualified persons for city service based on merit and fitness. The Commission is the city's employment and personnel department and adopts rules and regulations to govern applications, examinations, eligibility for assignment, transfers, promotions, resignations, reduction in force, the filling of positions, and other similar matters.

General Manager, Personnel

A General Manager, Personnel has been appointed by the Civil Service Commission to perform the duties of executive officer of the Civil Service System. He holds office at the pleasure of the Commission, and supervises the activities of a staff of 56 employees engaged in classification and salary administration, recruitment and examinations, and other in-service activities.

The organization of this department is depicted on the chart labeled Exhibit I.

Positions

Positions are created with the approval of the Board of Supervisors. Before any position is filled, however, the Civil Service Commission assigns the proper designation and classification. The Commission classifies all positions, unless specifically exempted by charter, in accordance with duties and responsibilities, and training and experience required.

Examinations of Applicants

Entrance -- Generally, entrance examinations require that the applicant be a resident of San Francisco for one year. For a certain few entrance jobs this prior residence requirement has been waived by the Board of Supervisors.

Promotional -- Generally, promotional examinations may be taken only by those already in city service with the additional requirement that their prior city experience must have been in certain jobs as determined by the Civil Service Commission.

Filling Vacancies

As a result of the examinations, a list of eligibles is compiled and ranked in order of examination scores, with the person receiving the highest score at the top of the list. Whenever a position is to be filled, the Department Head submits a requisition to the Civil Service Commission. The Commission thereupon certifies the name of the person standing highest on the list. The department must accept this person and appoint him to the open position. The appointee has a six month probationary period. At any time during the probationary period, the department head may terminate the appointment upon written notice.

Salary Administration

Acting on the recommendations of the Civil Service Commission, the Board of Supervisors has final authority on the amounts to be paid city employees.

The following breakdown is current for the approximately 21,000 employees paid by taxes collected from San Francisco taxpayers:

4,000 - employees excluded from city salary administration by the charter (teachers and other technical employees of the school department, employees of Steinhart Aquarium, law library departments, and certain others).

2,200 - organized trades or crafts employees.

2,000 - municipal railway platform personnel.

3,300 - police and firemen.

9,400 - miscellaneous employees, mostly office positions.

The proposed schedules of compensation are recommended by the Civil Service Commission on the basis of facts and data obtained in a comprehensive salary survey. The Commission publishes its findings as to what is the generally prevailing rate of pay for each job classification and recommends a rate of pay for each job in accordance with the data obtained.

The salary survey is to be made every 5 years except whenever in the judgment of the Civil Service Commission or the Board of Supervisors it is believed economic conditions warrant a survey being made more often. In recent years a survey has been made annually.

Suspensions and Dismissals

The charter provides that a permanent employee shall not be removed or discharged except for cause, upon written charges, and after an opportunity to be heard in his own defense.

The department head conducts a public hearing and may exonerate, suspend, or dismiss the employee.

The employee may appeal, in writing, to the Civil Service Commission. The Commission examines the case and makes such decision as it believes is just, including over-ruling the Department Head.

If the employee does not want to accept the decision of the Civil Service Commission, he may go to the courts.

For disciplinary purposes, the Department Head may suspend an employee for a period not over 30 days, resulting in a loss of salary for the term of the suspension.

Payroll

While all employees are paid by warrants or pay checks issued by the Controller, the charter requires that the Civil Service Commission examine and approve the payroll for the legal existence of the positions shown and for the correctness of the rate of pay.

Performance Rating of Employees

An Employees Evaluation-Development plan has recently been initiated and is still in the experimental stages. It requires that employees be counselled four times by their supervisor during the probationary period. This is done with the expressed purpose of aiding the employee to develop himself. It also provides a written appraisal of the employee's performance and thus can be used to support termination of the employee before the probationary period is over.

Training

A formal training program is currently limited to the Employee Evaluation-Development plan designed to train supervisors in correctly and consistently rating their probationary employees.

ORGANIZATION OF CIVIL SERVICE - PRESENT

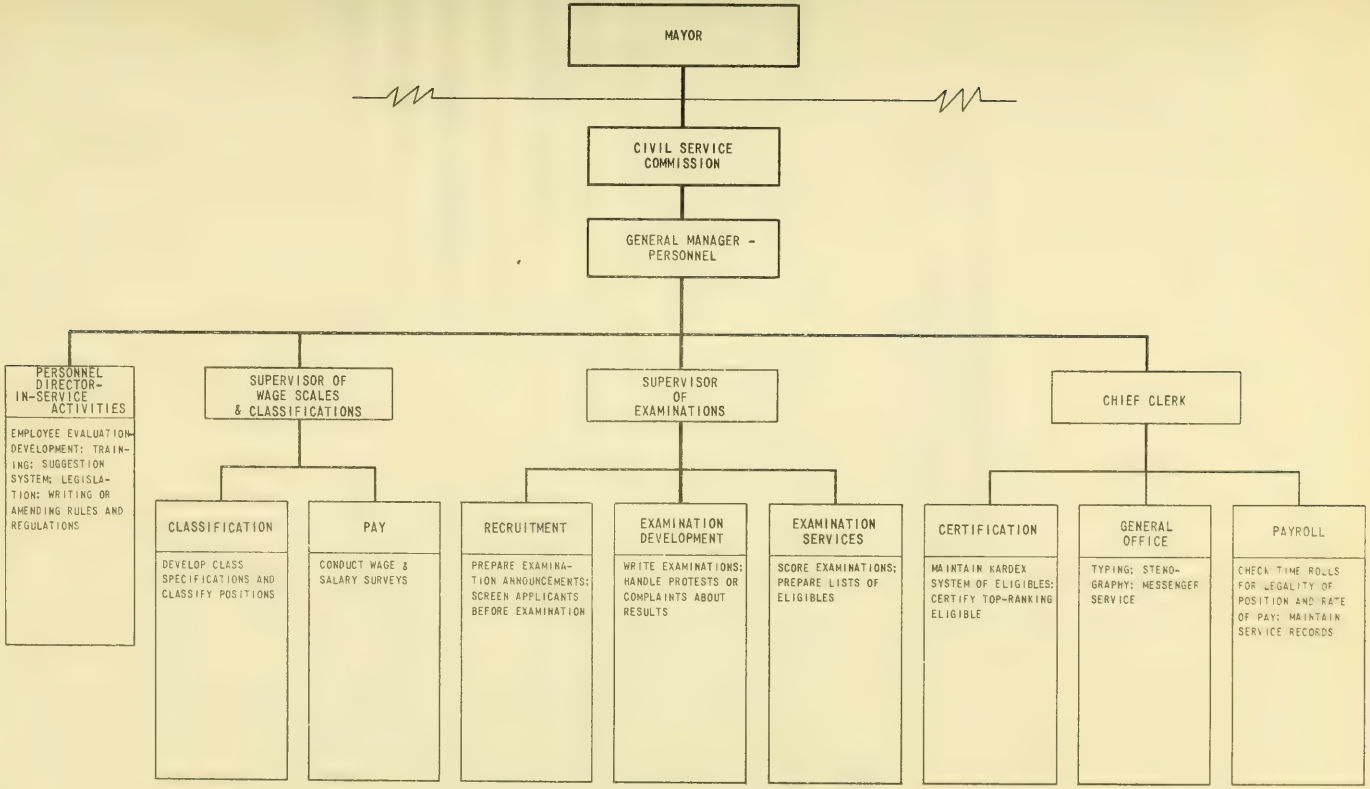

EXHIBIT I

II

APPRAISAL OF PRESENT CIVIL SERVICE SYSTEM

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II. APPRAISAL OF PRESENT CIVIL SERVICE SYSTEM

Positions

In 1960, the city contracted at a cost of $44,000 the services of J. L. Jacobs & Company to provide up-to-date job classes (class specifications) for all city jobs. This was completed in December 1960 and civil service is now in the process of assigning the new job titles to all employees. It is our understanding that this complete survey was the first one made in some 30 years.

That a complete survey was needed is shown by these statistics:

Year	Civil Service	Job Classes
1940	10178	714
1960	17183	932
% of increase	68%	31%

While we recognize that part of the growth in the number of employees can be attributed to the population expansion of present job classes, we can also deduce from the statistics that many new employees were assigned existing job classes rather than providing new ones.

We are unable to estimate or judge how many misclassifications exist in city service but an indication can be obtained from the following illustration:

Existing Civil Service Class	Types of Work Done
Chauffeur	Motor Equipment Operator Heavy Equipment Operator Light Motor Equipment Operator Caretaker Gardener Chauffeur (passenger cars)
General Clerk	Payroll Audit Clerk Fare Collection Cashier Junior Clerk Clerk-Typist Personnel Clerk Tabulating Machine Operator Storekeeper Senior Clerk-Typist Teller
Head Nurse	Supervising Nurse Central Supply Room Supervisor Assistant Director of Nurses

Misclassifications may result in either over-paying or under-paying the employees affected for the work they are performing. Accurate class specifications are the basis for promotions and for salary administration. It is imperative that they be kept current.

It is our understanding that the most important reason for the city's situation is that the civil service staff has had only one job analyst for many years. The task of maintaining class specifications in current condition as well as writing new ones as new jobs are created, is an impossible task for one man, considering the size of the city's operation. Four job analysts were trained by working with the Jacobs Company experts and should in the future provide sufficient help to maintain class specifications in current condition.

Filling vacancies by recruitment or promotion

The foundation for the Civil Service system is open competition for jobs. This competition presumably results in selection of the most qualified candidate for the job. It essentially is comprised of:

1. Public announcement of openings.

2. Examinations open to all qualified citizens.

3. Closed registers fixing the list of eligibles determined by the examination.

4. Appointment from the top name of the register of eligibles.

This field is one of the most complex in the Civil Service and should be studied at greater length than was done in the time allotted to the Task Force. Its importance to the success of city management is unquestioned. One need only consider that if able men are not recruited to the city service, the remaining staffing processes will consist only of shuffling the mediocre around.

Our study leads us to make some general comments and recommendations which we believe can be implemented under the leadership of a Personnel Director working directly under the administrative head of the city.

First, the city's method of announcing examinations is to post the announcement in public buildings and to circularize a list of organizations that might be in a position to have, or know of, applicants. In some cases, a limited advertising budget permits newspaper ads. This method is impersonal and unimaginative and cannot be expected to be completely effective in attracting applicants.

Second, the residence rule, unless specifically waived by the Board of Supervisors, restricts recruitment efforts at universities where the most likely candidates are to be found for professional positions. It also precludes the hiring of newly arrived inhabitants.

Third, the examination process does not assure that the most qualified men will get the job.

Because the examination process is designed to negate patronage-type appointments, special emphasis has been placed on formal selection procedures. For instance, in San Francisco the "rule of one" applies, i.e., when a requisition is received from a department, the civil service certifies to the department the top name on the eligible list and the department head is required to appoint the individual named. This method would be proper if the testing program can be relied upon to be perfectly valid. While there have undoubtedly been important advances toward perfecting tests, including introducing oral boards as part of the testing procedure, reliability is still doubted, particularly in the areas of such factors as ability to get along with fellow workers, initiative, enthusiasm, ability to supervise, and ability to administer.

Further it has been stated that about 52% of the persons passing examinations waive their rights. It is reasonable to assume that a great number of these take the examination only for experience so that they will be better prepared for jobs they are really interested in. Because the "practice" in taking examinations leads to proficiency in answering questions it is often likely that when one of these persons finally accepts an appointment, he may not be the most qualified candidate, but the best examination taker.

Also the present system requires almost four months between the examination announcement and the certification of the top eligible for appointment. In the case of entrance examinations, a superior candidate is not likely to wait very long to know whether he is going to get the job.

Finally, when promotional examinations are given, the applicant must have been classified in a specific job class to qualify for the examination. We have heard several cases at Civil Service Commission meetings where individuals seemed to have the necessary background but were prohibited from taking the examination because the formal experience requirement was not met.

Fourth, a frequent complaint from operating department heads is that the civil service process is too slow, that it does not provide a replacement when it is needed. For instance, on a purely routine requisition, the best service the department is able to obtain is two weeks. If any sort of a problem exists, the time can be lengthened to months and sometimes years. An analysis of the number of requisitions on file in the Civil Service Commission as of March 24, 1961 indicates that there were 250 requests from operating departments to fill permanent positions. The average requisition was 27 weeks old, without counting one position which has been vacant 10 years. Details are shown in Exhibit II. A similar analysis covering requisitions for temporary positions indicates that the average age of the unfilled requests is 13 weeks. Details are shown in Exhibit II-A.

To overcome the necessary delays which a formal system of recruitment requires, several degrees of civil service status were developed. These range from "non civil-service" which does not require civil service approval for appointment, to "limited tenure" which requires an easier civil service examination for appointment but does not result in permanent status. These substitutes are used quite frequently as shown on Exhibit III.

Fifth, an important facet of the present examination and appointment process is that the individual who has been assigned to a position on a temporary or limited tenure basis does not always get the permanent appointment. When the examination is eventually given, the one receiving the highest score receives the permanent appointment. He is not necessarily the same person who has been handling the job for many months in some cases, thus requiring another training period for the new incumbent.

On promotional examinations a similar occurrence may and often does take place. The individual who has worked for and waited years in some cases for promotion to a management job for which his duties put him in line, would have to pass the examination with the highest score to get the appointment. If he does not, he may then be in the position of having to "train" his boss. This type of situation is disheartening and in some cases, grossly unfair to the employee who has worked hard. Most importantly, however, he may have better qualifications to do the job than the one who got the highest score. Cases like this do not seem to be isolated as we have been told by department heads that it happens more frequently than they would like. Also, any person may take the examination if he qualifies by experience and no attention is given as to whether the employee's performance on his present job fits him for promotion.

In other cases, the promotional examination system works a hardship on certain individuals. There are instances where the replacement for a job vacated by a retiring employee has not been selected for one to two years. In the meantime, an employee who is classified on a lower level performs the duties of the higher job but does not receive the pay for the higher job. At the same time it is possible that the man's supervisor must assume the higher level duties of the retiree pending the selection of a replacement.

Wage and Salary Administration

With the present grouping of employees, four separate pay policies are necessary for the approximately 17,000 city employees whose pay is under the control of the Civil Service Commission:

Type of Employment	No. of Classes	No. of Incumbents	Method
A. Police & Fire	41	3,380	Rates set annually up to highest rate paid in California cities over 100,000.
B. Railway Platform Employees	3	1,950	Rates set annually on average of two highest rates in United States cities of over 500,000 with surface railway systems employing over 400.
C. Trades & Crafts (Blue Collar)	89	2,201	Rates set annually to equal prevailing union contract rates.
D. Miscellaneous (White Collar)	758	9,398	Rates set in accordance with generally prevailing rate of wages paid in San Francisco industry or in other comparable California public jurisdictions.

Group A. -- Police and Firemen. While the charter language permits some discretion in fixing a rate "up to the highest" paid in California cities, San Francisco rates are equal to the highest. As a matter of practice in recent years, San Francisco rates have been increased each time any of the cities in question exceeded the San Francisco rates.

Group B. -- Municipal Railway Operators. The charter language permits no discretion here. It is mandatory that San Francisco pay these employees a rate equal to the average of the two highest in the United States. There is no provision in the charter for consideration of possible reasons why these other railway systems are paying higher rates than the rest.

Group C. -- Trades & Crafts. On November 6, 1945 San Francisco voters approved a charter amendment by adding Section 151.3. The Civil Service Commission intended this section to be a continuation of Section 151 which deals with salary standardization in accordance with the prevailing rate of pay. It was designed, therefore, to make it easier to determine the prevailing rate of pay by surveying certain collective bargaining agreements.

Currently there are between 32 and 34 union contracts, mainly those with the construction industry, used to determine the rate of pay.

It is our opinion that the construction industry, upon which many rates for these employees are based, does not provide the proper comparison of jobs. The construction industry usually offers casual and intermittent employment, employees are subject to work stoppages because of bad weather, lack of materials or changed work orders, and difficulties with transportation on work location changes are common. In contrast, the city employee is assured of continuity of employment in essentially the same area.

In addition, the Civil Service Commission did not intend that the city assume the whole collective bargaining agreement but only that portion dealing with the basic rate of pay. However, court decisions as a result of numerous cases have interpreted the "rate of pay" language to include pay for holidays, overtime, shift differentials, hours of work, vacations, and recently even health and welfare plans. Under these interpretations, the city is required to treat each craft differently with respect to these items. This is cumbersome and costly to administer and is alleviated only slightly by having employees sign waivers whenever contract hours of work are different from those usually worked in the city. The administration of the variety of health and welfare plans is so complex that recently employee representatives have met with the civil service staff in an attempt to agree on a standard, more simple method.

An illustration of the effect of the current wage administration practice with respect to employees covered by 151.3 is contained in Exhibit IV.

Group D. -- Miscellaneous Employees. The Charter provides that salaries for these jobs be set "in accordance with the generally prevailing rates of wages." In a community like San Francisco there are many rates for similar jobs and it is impossible to select one of these rates as prevailing. As a result, there has been a great deal of difficulty in developing a precise meaning for the words "prevailing rate."

A 1944 court case established that the determination of whether San Francisco rates are in accord with generally prevailing rates is within the discretion of the rate-making authority.

At present, the Civil Service Commission determines what San Francisco should pay its employees by relying on the salary ranges established by either private industry or by public jurisdictions. The information is obtained by two surveys: one is conducted by the Bureau of Labor Statistics and covers 79 job classes in 99 San Francisco firms; the other survey is made by the Civil Service staff for all 758 job classes in other comparable public jurisdictions in California

The B. L. S. report furnishes individual rates of pay for each of the people surveyed and also reports salary ranges used by the various firms covered. If no salary range is in effect for a given job the staff calculates the 40th and 80th percentile of the individual salaries paid and uses this in lieu of a range. In averaging the combined B. L. S. data and the public data, the staff weights the B. L. S. data in the ratio of 11 to 1 since private companies in San Francisco employ 11 people to the one in public employment.

We believe the method of determining the prevailing rate is subject to reconsideration. First, it is our experience, and B. L. S. data confirms, that most employees of those companies using salary ranges are not being paid the maximum rate and therefore the average city employee (whose rate averages out at the 4.3 step of the 5-step range) is at a decided advantage. Second, using the 40th and 80th percentile is contrary to the most common and accepted practice of using the middle 50% to determine the market rate of any given job. The city's present method is to drop 15% of the lowest rates, add 5% of the highest rates and reduce the data from 50% to 40%. Further, either the top of the reported range or the 80th percentile is usually used to determine the 5th or top step in the city range. Since each of the 5 steps in the city range is 5% greater than the preceding step it can be seen that little consideration is given to the 40th percentile or the industry range minimum. The net effect of this reasoning is to raise the level of rates used for determining the "generally prevailing rate." This conclusion is supported by comparing actual earnings of city employees with the actual earnings of San Francisco industry reported by the B. L. S. as shown in Exhibit V.

There are other weaknesses in the present method of surveying each of the 758 job classes. First, it does not provide the desired complete information to enable the Civil Service to properly determine the prevailing rate for each job class.

An analysis of the published findings of the 1961 survey tends to support this point. We have found that:

16% (121 job classes) - no salary data is collected and no internal relationship is specified.

26% (197 job classes) - no salary data is collected but a relationship to other jobs is specified.

14% (106 job classes) - salary data is collected for only one other incumbent in a similar job.

14% (106 job classes) - salary data is collected for 2-4 other incumbents in similar jobs.

30% (228 job classes) - data is collected for jobs with 5 or more incumbents.

Second, surveying each job class leaves doubt as to the accuracy of the data obtained. Analysts engaged in this work cannot reasonably be expected to know the functions of each job so well as to insure the comparability necessary to ascertain true job value.

Third, establishing the rate of pay for each job class as done by the present method requires 758 individual decisions, each of which is subject to criticism by employees or their representatives. Rates recommended by the Civil Service are capable of being and have been criticized by employee representatives on: the interpretation of the published data; whether true job comparisons were made; the belief that data was available in certain jurisdictions but was not considered by the staff; the belief that the staff published only data that was detrimental to the employees; any other bases which employees thought would support their viewpoint.

Fourth, this method contributes toward a climate of increasing discontentment among employees. Fixing a rate for each job class on the basis of data for each job class, necessarily causes the proposed rates to go up or down depending on the data obtained. This was strikingly illustrated at the hearings held by the Judiciary Committee of the Board of Supervisors in February, 1961. First, there were frequent complaints from groups of employees whose job rates were not recommended for increases. Then there were complaints that the parity relationships which had existed for years on certain jobs were being destroyed by this year's recommendations. And finally and most dramatically, there was many an indignant employee who found that the job from which he was promoted was now going to be paid as much or more than the job he accepted as a promotion.

Fifth, many of the decisions made by the Civil Service with this method are not easily explained. These decisions are pure judgment of individual cases and although reasons are given, the employee is understandably confused. There are many cases where he fails to see any reason. As a result he mistrusts and criticises a system he doesn't understand.

Sixth, the method of determining each job's rate by comparing it to the rate of another job has definite disadvantages when the comparing data is based on one or two other incumbents. Consider this case: San Francisco Job A with one incumbent is given a rate based on comparison with the rate of Los Angeles Job A with one incumbent. If the Los Angeles man was not doing his job properly and Los Angeles decided not to increase his rate this year, the man in San Francisco, who may be a good man, will not get an increase either. Or, conversely, we would be grossly overpaying the San Francisco job with an inefficient employee when comparing it to a Los Angeles job with an outstanding employee who has been given increases steadily.

Suspensions and Dismissals

It is a general belief that Section 154 of the charter limits dismissal of permanent employees to "incompetence, habitual intemperance, immoral conduct, insubordination, discourteous treatment of the public, dishonesty, inattention to duties, or engaging in prohibited political activities." This is substantiated by the rules of the Civil Service Commission which state that appeals from orders of dismissal may be entertained if "the dismissal was made upon cause not covered by Section 154 of the charter."

We believe the charter language is sufficiently broad and does not limit the line department head's authority for dismissals. However, the administrative rules and the precedents established by court cases have given the impression that the department head must have evidence that will stand up in court before he can properly dismiss an employee. As a result, many departments are reluctant to prefer the charges necessary to dismiss an employee who has achieved permanent status.

Payroll

The Civil Service Commission must certify as to the "legality" of the positions for each pay period before the Controller will issue pay warrants or checks.

At present, this activity is carried on manually by some 10 clerks. It is cumbersome and slow and has resulted in one instance we are aware of when a group of employees did not get paid on their normal pay day. It is our understanding that such a situation does not happen often. However, there should be no reason why employees cannot be paid on their scheduled pay day.

Performance Rating of Employees

At present, there is no general method of providing information on the type of performance an employee gives to his job. Knowledge of performance on the job is limited to the probationary period and only for certain departments. The incentive value of measuring a man's performance is lost for the most part by the absence of a general program.

Training

A central training program that cuts across department lines has been a widely accepted activity in most modern organizations. It would seem this would be a profitable area for the city to consider since it is not always possible to obtain skilled employees. The city has already initiated one program for training first-line supervisors in supervisory principles but many more programs are necessary for maximum results.

Civil Service Commission

While we believe the Civil Service Commission as organized has contributed materially toward stopping the evils for which it was designed, we feel that improvements can be made.

First, because the commission is supposed to be a policing force, it is separated from the city's operating departments. Thus it makes decisions from a detached viewpoint when instead the personnel function should be an integral part of the management of the city. We have had from several department heads the complaint that the Commission is inclined more to the legality of its position than to the service and aid of the operating departments.

Second, the present practice of appointing commissioners results in having men on this important commission who do not have a background in personnel management. Lacking practical experience in this field, they bring a layman's viewpoint to the city's personnel administration. Because it is apparent these men are able people in their own field who accept the post with the sincerest of motives, we believe the layman's viewpoint can best be utilized in hearing appeals.

Third, we believe the Commissioners, because they are charged with the responsibility of personnel administration, devote excessive time and effort in administrative matters more properly belonging to the staff. If proper rules and regulations are drawn, the majority of cases now being decided by the commission at formal hearings can be delegated. These cases are illustrated in Exhibit VI.

Communication Between Management and Employee

City government, as presently constituted, lacks channels of communication between top management and the individual employee. Apart from his immediate supervisors, the employee has no one in management with whom he can discuss personal problems, such as lack of rapport between himself and his supervisor, salary inequities, working conditions, reaction to fellow workers, personal ambitions, promotional opportunities, and even difficulties with personal finances.

In the circumstances the employee must work out his own problems without benefit of counsel and guidance from a representative of top management who is skilled in these matters and who can speak with authority from a personnel relations viewpoint.

This situation encourages a struggle between the employee and management and is not conducive to the establishment of an "esprit de corps" or unity of purpose so necessary to efficient government.

COUNT OF UNFILLED REQUISITIONS FOR PERMANENT POSITIONS AS OF MARCH 24, 1961

No. of mpl.	Class No.	Class	Department	Time Elapsed Since Requisition Placed					
				1-3 Wks.	4-8 Wks.	3-6 Mos.	7-12 Mos.	1-3 Yrs.	Over 3 Yrs.
1	A 8	Asst. Supt. Maint. & Repair	P.W.		1				
1	A 154	Carpenter	Ed.				1		
1	A 404	Plumber	P.W.				1		
10		Deputy Clerk	Muni Ct	1		2	4	3	
1	B 2	Acct. Clerk	Purch.		1				
3	B 4	Accountant I	Purch.	1	2				
1	B 68	Chief Clerk	Registrar		1				
1	B 102	Teller	Tax Collect.	1					
1	B 104	Sr. Teller	Tax Collect.			1			
1	B 186	Real Est. Investigator	Pub. Admin.		1				
2	B 210	Office Assistant	Welfare		2				
2	B 234	Head Clerk	P.W.			2			
1	B 250	Parking Meter Collector	Tax Collect.		1				
1	B 302	Address. Mach. Operator	P U C	1					
3	B 352	Storekeeper	Purch.		2		1		
1	B 358	Asst. Stationery Buyer	Purch.			1			
1	B 407	Steno. I	Police	1					
1	B 562	Super. Comm. Div. Airport	P U C				1		
7	C 52	Elevator Operator	P.W.	1	2	2	2		
35	C 106	School Janitor	Educat.		6	13	16		
1	D 2	Bailiff	Sheriff				1		
2	D 52	Jail Matron	Sheriff			1	1		
1	D 102	Writ Server	Sheriff					1	
1	E 106	Armature Winder	P. U.			1			
1	E 106.1	Foreman Armature Winder	P. U.		1				
1	E 161	Gen. Foreman Lineman	P.U.C.		1				
1	E 200	Elec. R. R. Shop Mech.	P. U.			1			
7	F 51	Airport Attendant	P.U.C.		1	2	4		
1	F 122	Sr. Arch. Draftsman	P.U.C.	1					
6	F 404a	Asst. Engineer	P.U.C.		2		1	2	1
1	F 404b	Asst. Engineer-I	P.U.C.				1		
3	F 404c	Elect. Engineer	P.U.C.			2			1
2	F 406b	Elect. Engineer-II	P.U.C.				1		1
2	F 406c	Elect. Engineer-II	P.U.C.		1	1			
5	F 410a	Engineer	P. U.		1		2		2
3	E 412a	Sr. Civil Engineer	P.U.C.			1	1	1	
1	F 412b	Sr. Mech. Engineer	P.U.C.				1		
1	F 522	Asst. Engineer	P.U.			1			
1	F 568	Urban Renewal Analyst			1				
1	F 810	Assoc. City Planner	City Plan.		1				
1	F 830	City Planning Draftsman	City Plan.				1		
1	G 3	Real Prop. Appraiser	Asses. Office			1			
1	G 10	Super. Bldg. Appraiser	Asses. Office			1			
1	G 17	Chief Personal Prop. Appr.	Asses. Office			1			
1	G 19	Marine Surveyor				1			
1	G 50.3	Personnel Aide	C.S.				1		
1	G 58.2	Sr. Civil Serv. Examiner	C.S.					1	
1	G 154	Sr. Inspector	Tax Collector		1				
2	H 4	Inspector	Fire				2		
1	H 32	Capt. Bureau Fire Preven.	Fire					1	
1	H 40	Battalion Chief	Fire	1					
1	H 120	Pilot - Fireboats	Fire			1			
2	I 10	Cooks Asst.	Health		1	1			
3	I 116	Orderly	Health	3					
1	I 120	Sr. Orderly	Health		1				
22	I 134	Lic. Voc. Nurse	Health	5	7		5	5	
2	I 204	Porter	Health	2					
1	J 70	Hostler	Rec. & Park.					1	
1	J 74	Rodent Controllman	Health			1			
1	K 20	Attn. Bureau Delinq. Revenue	Tax Coll.			1			
1	L 16	Asst. Dir. Pub. Wks.	Health				1		
1	L 56	Microbiologist	Health			1			
3	L 67	Asst. Clin. Tech.	Health					3	
1	L 372	Asst. Dir. Maternal & Child Hyg.	Health		1				
1	L 367	Chief Div. Venereal Dis. Control	Health		1				
1	M 54	Auto Machinist			1				
1	N 53	Asst. Dist. Super			1				
1	N 66	Chief Dairy-Milk Insp.	Health		1				
1	O 1	Chauffeur	Health	1					
1	O 51	Farmer Sub Foreman	Health			1			
5	O 60	Sub-Foreman Gardener	Rec. & Park		1	1	3		
2	O 172	Chief Operating Engineer				2			
1	O 304	Hydrantman-Gateman	Fire Dept.				1		
6	P 102	Registered Nurse	Health	19	23			4	
1	P 104	Head Nurse (Hasaler)	Health				1		
1	P 208	Operating Room Nurse	Health		1				
2	P 304	Instructor of Nursing	Health			1	1		
2	Q 20	Policewoman	Police		1				1
1	Q 65	Fingerprint Tech.	Police					1	
1	R 111	Lifeguard Watchman	Rec. & Park						1
1	S 120	Day Dispatcher	P.U.C.			1			
1	S 124	Supv. of Schedules	P.U.C.				1		
1	S 126	Supv. of Traffic	P.U.C.				1		
1	S 300	Chief of Transportation	Mayor						1 (10 yrs)
1	T 155	Medical S.S. Worker	Various		2				
1	U 108	Compressor Oper. - Portable	P.U.C.				1		
2	U 220	Gateman	P.U.C.				2		
1	U 142	Asst. Superintendent	P.U.C.			1			
1	U 144	Super. City Dis. Div.	P.U.C.		1				
1	K 10	Coord. Children Activities	Library					1	
1	K 40	Sr. Librarian	Library	1					
0		GRAND TOTALS		39	72	47	60	24	8

Data collected from files of Permanent and Temporary Requisitions of Civil Service Commission - March 24, 1961

COUNT OF UNFILLED REQUISITIONS FOR TEMPORARY POSITIONS AS OF MARCH 24, 1961

Class No.	Class	Department	Time Elapsed Since Requisition Placed: Weeks 2	Weeks 3	Weeks 4	Weeks 5	Weeks 6	Months 2	Months 3	Months 4	Months 5	Months 9
A 154	Carpenter	P.U.C.				1						
A 155	Cribber	P.U.C.					4					
A 202	Cement Finishers Helper	P.W.									1	
A 204	Cement Finisher	P.U.C.						1				
A 354	Pointer	P.U.C.					1		1			
A 456	Sheet Metal Worker	P.W.						2				
	Dep. Clerk	Muni. Ct.						2				
B 4	Accountant I	Various						1	1			
B 6	Accountant II	Various			1				1			
B 11	Cost Analyst	Superv.								1		
B 102	Teller	P.U.C.					1					
B 159	Asst. Law Clerk	Sheriff						1				
B 228	Senior Clerk	Sheriff & Wks.			1			1				
B 302	Addrss. M. Opr.	Registrar				2						
B 305	Voting Mach. Adjust.	Registrar						1				
B 308	Calc. Mach. Opr.	P.U.C.						1				
B 309	Key Punch Opr.	Various		1		2	1					
B 310	Tab. Mech. Opr.	Various		1	1							
B 310.1	Sr. Tab. M. Opr.	Welfare		1								
B 352	Storekeeper	Education		1								
B 560	Comm. Clerk	P.U.C.		1								
C 104	Janitors	Various								32		24
C 106	School Janitors	Education								65		
C 106	School Janitors P.T.	Education							6			
C 152	Watchman	Rec. & Park		1								
C 184	Hd. Galley Atten.	de Young	1									
D 52	Jail Matron	Various							3	2		
E 108	Electrician	P.U.C.							1			
E 120	Governor Man	P.U.C.							1			
E 122	P.H. Operator	P.U.C.							1			
E 200	Elect. R.R. Shop Mech.	P.U.C.								1		
F 91	Stu. Eng. Trainee I	P.W.					1					
F 93	Stu. Eng. Trainee II	P.W.					1					
F 104a	Sr. Draftsman	P.W.					1					
F 352	Asst. Hydrographer	P.U.C.			1							
F 406a	Asst. Engineer II	P.W.					2		1			
F 406c	Asst. Engineer II	Elect.							1			
G 3	Real Prop App.	Asses.		1								
G 15	Prop. Auditor	Asses.					1					
I 10	Cooks Asst.	Health					1					
I 16	Chef	Health						2				
I 53	Vendor	Rec. & Park								3		
I 94	School Cafe Helper	Education					1	5				
I 116	Orderly	Health					1					
I 116	Orderly (F)(M)	Health	12	4			12	11		29	11	
I 170	Washer	Health						1				
J 66	Garageman	Various				1		1				
J 70	Hostler	P.U.C.								1		
L 67	Asst. Clin. Tech.	Health					1					
M 54	Auto Machinist	P.U.C.					1					
M 260	Instrument Maker	Elect.						1				
O 1	Chauffeur	P.U.C.						2	1	1	1	
O 3	Sch. Truck Driver	Education					1	1				
O 52	Farmer	Sheriff	1									
O 57	Tree Topper	P.U.C.								1		
O 58	Gardener	Various	6	2			3	2				
O 152	Engr. H.P.	P.U.C.						1	2			
O 172	Chief Operating Engineer	P.W.				1			1			
O 280	Sub for Asphalt Finisher	P.W.					1					
P 102	R.N's	Health						6	25			
P 103	Special Nurse	Health						21				
P 104	Head Nurse	Health						1				
R 111	Night Super.	Health						1				
R 55	Rec. Asst.	Rec. & Park							9			
R 56	Rec. Director	Rec. & Park							10			
R 56	Rec. Director	Education		5			5					
R 56	Rec. Director	Education	1			1	5	10	1		1	
R 110	Lifeguard	Rec. & Park						20		20		
R 114	Swim Instructors	Rec. & Park						10				
T 56	Problem Officer	Adult Probation		1								
T 155	Med. S.S. Worker	Health	1									
U 108	Compressor Operator	P.U.C.						1				
U 116	Service Man	P.U.C.									1	
U 127	Water Serv. Insp.	P.U.C.					1					
U 136	Gen. For. Serv. & Meters	P.U.C.									1	
U 140	Gen. For. Maintenance Pipes	P.U.C.						1				
X 42	Librarian	Library						22	24	25		
X 14	Curatorial Asst.	Legion of Honor	1									
			23	19	4	8	46	130	90	181	16	24

ILLUSTRATION OF THE USE OF VARIOUS APPOINTMENT CATEGORIES

1960 Month	Number of Certifications: Permanent	Limited Tenure	Temporary	Census Of Non-Civil Service Employees
January	223	49	195	784
February	131	38	330	770
March	180	38	226	873
April	158	44	196	845
May	79	57	310	906
June	129	42	288	1172
July	255	36	267	1252
August	223	29	223	1272
September	188	48	316	1145
October	141	65	341	1186
November	157	99	268	968
December	145	103	274	1268
TOTALS	2009	643	3234	12443
AVERAGE PER MONTH	167	54	270	1037

COMPARISON OF TRADE AND CRAFT RATES OF PAY

EXHIBIT IV

Job No.	Job Title	No. of People	Approved S.F. Rate	(1) B.L.S.	Difference	Total Difference	(2) Bay Area Survey Public Min. Wtd. Avg.	Public Max. Wtd. Avg.	Private Employ Wtd. Avg.	State of Calif.	Fed. Govt.	Los Angeles City	City of Oakland
A 154	Carpenter	62	$669	$558	$111	$6,882	$ 465	$ 504	$ 530	$505-556	$470-518	$ 592	$582-[illegible]
A 354	Painter	75	664	546	118	8,850	513	549	522	505-556	478-520	590	523-[illegible]
E 108	Electrician	43	712	544	168	7,224	550	594	547	505-556	492-534	720	591-[illegible]
G 66	Garageman	83	433	No Data	-	-	383	443	423	358-397	411-445	355-440	[illegible]
M 53	Auto Mechanic	61	597	558	39	2,379	481	533	544	505-556	478-520	464-545	501-557
M 254	Machinist	34	584	541	43	1,462	490	535	533	---	492-534	489-575	500-[illegible]
O 1	Chauffeur (Hvy.Trk.)	180	664	544	120	21,600	452	495	534	436-481	466-504	417-516	440-[illegible]
O 3	Chauffeur (School) (Lt.Trk.)	7	573	500	73	511	439	470	524	415-458	425-459	395-489	440-[illegible]
O 58	Gardener	375	546	No Data	-	--	413	459	395	358-395	411-445	355-440	306-[illegible]
O 166.1	Jr. Oper. Engr.	99	505	465	40	3,960	439	500	453	---	---	---	---
O 168	Operating Engr.	142	545	544	1	142	521	558	530	505-556	470-518	---	525-[illegible]
	No. People x BLS rate =			$376,073		$53,010							

$$\frac{53,010}{376,073} = \underline{14.1\%}$$

Analysis of the above tabulation indicates that present city rates are generally higher than both private employment and other public jurisdictions. The specific comparison of City rates with B.L.S. discloses a 14.1% pay advantage for City employees by virtue of establishing their rates on, for the most part, collective bargaining agreements with the Associated General Contractors Association and other Contractors.

(1) Bureau of Labor Statistics; (a January 19[illegible] survey of 260 manufacturing and non-manufacturing establishments with employ[illegible] of 204,000 in the San Francisco-Oakland metropolitan area)

(2) Survey conducted in October 1960 by and [illegible] public jurisdictions in the Bay Area; [illegible] data obtained from all public jurisdiction[illegible] private data obtained from 234 firms

EXHIBIT 1
(Page 1 of 2 pages)

COMPARISON OF MISCELLANEOUS EMPLOYEES RATES OF PAY
(B.L.S. DATA)

No.	Job Title	No. People	Jan. 1961 Aver. Step in Range	July 1961 pro-posed Salary	Jan. 1961 BLS Wtd. Avg.	Differ-ence	Total Differ-ence
	Account Clerk	21	5	$436	$391	$ 45	$ 945
	Accountant I	99	4.3	538	490	48	4,752
	Accountant II	45	4.4	641	635	6	270
0	Accountant III	27	4.3	756	656	100	2,700
4	Sr. Accountant	20	4.2	893	837	56	1,120
5	Asst.Dir.Bur.Pub.Serv.	2	3.6	805	799	6	12
3	Chief Clerk	9	5	782	777	5	45
02	Teller	12	4.6	460	349	111	1,332
10	Office Assistant	33	3	310	298	12	396
21	Clerk I	1	5	358	334	24	24
22	General Clerk	224	4.5	426	395	31	6,944
28	Sr. Clerk	48	4.8	525	428	97	4,656
37	Med.Record Librarian	3	5	493	436	57	171
38	Sr.Med.Record Librarian	1	5	530	503	27	27
47	Meter Reader	16	4.5	458	463	5	80
02	Address.Mach.Opr.	5	4.7	371	326	45	225
04	Sr.Address.Mach.Opr.	1	5	481	431	50	50
06A	Dup. Mach. Opr.	4	3.8	525	447	78	312
08	Calc. Mach. Opr.	49	4.5	405	369	36	1,764
09	Key Punch Opr. IBM	34	4.3	401	370	31	1,054
10	Tab. Mach. Opr.	41	4.4	445	430	15	615
10.1	Sr. Tab. Mach. Opr.	10	4.1	533	551	-18	-180
11	Bookkeeping Mach. Opr.	22	4.6	428	398	30	660
25	Blueprinter	3	5	493	410	83	249
27	Photostat Opr.	9	4.6	483	475	8	72
30	Photographer	7	4.4	611	578	33	231
52	Storekeeper	33	4.5	426	426	--	----
54	Gen. Storekeeper	12	4.6	508	544	-36	-432
56	Asst. Purchaser Sup.	7	4.6	826	765	61	427
07	Stenographer I	9	1.6	335	368	-33	-297
08	Gen. Clerk-Steno.	464	4.2	429	382	47	21,808
10	Legal Steno.	30	4.4	456	439	17	510
12	Sr. Clerk-Steno.	36	4.5	518	451	67	2,412
54	Telephone Operator	71	4.6	407	362	45	3,195
11	Typist I	22	1.8	292	306	-14	-308
12	Gen. Clerk-Typist	546	4.4	423	356	67	36,582
16	Sr. Clerk-Typist	23	4.1	508	421	87	2,001
2	Elevator Operator	33	2.6	335	340	-5	-165
02	Janitress	28	2.2	344	333	11	308
04	Janitor	282	4.1	378	366	12	3,384

EXHIBIT V
(Page 2 of 4 pages)

COMPARISON OF MISCELLANEOUS EMPLOYEES RATES OF PAY
(B.L.S. DATA)

No.	Job Title	No. People	Jan. 1961 Aver. Step in Range	July 1961 pro-posed Salary	Jan. 1961 BLS Wtd. Avg.	Differ-ence	Total Differ-ence
52	Watchman	79	4.6	$ 369	$ 352	$ 17	$ 1,343
20	Governorman	3	4.6	472	469	3	9
22	Power House Opr.	27	4.2	535	548	-13	-351
24	Sr. Power House Opr.	7	4.5	728	709	19	133
00	Jr. Draftsman	14	4.2	474	429	45	630
02	Draftsman	53	4.6	573	491	32	4,346
08	Architect	10	4.9	992	824	170	1,700
20	Arch. Draftsman	8	3.8	607	574	33	264
22	Sr. Arch. Draftsman	13	4.7	771	681	90	1,170
01	Jr. Engineer	48	3.4	582	550	32	1,536
04	Asst. Engineer-I	42	4.8	738	692	46	1,932
06	Asst. Engineer-II	50	5	905	798	107	5,350
10	Engineer	31	4.8	1,089	912	177	5,487
02	Right of Way Agent	10	4.8	794	769	25	250
54	Seamstress	10	4	350	310	40	400
	Sr. Att. - Civil	9	3.3	1,012	879	133	1,197
5	Clinical Lab. Tech.	7	4.3	551	495	56	392
0	Physical Therapist	3	3.7	498	428	70	210
30	Water Chemist	10	4.5	570	510	60	600
32	Sr. Water Chemist	1	5	745	652	93	93
02	Dietition	7	4.7	536	474	62	434
52	X-Ray Technician	13	3.4	423	407	16	208
02	Registered Nurse	295	4.6	460	383	77	22,715
04	Head Nurse	68	4.9	553	450	103	7,004
11	Night Supt. of Gen. Hosp.	2	5	710	507	203	406
55	Medical Social Worker	19	4.4	657	542	115	2,185
	TOTALS	3,181	4.3	1,509,497	1,352,063		157,434

$$\frac{157,434}{1,352,065} = 11.6\%$$

These figures indicate the City employee's actual earnings are 11.6% higher than the actual earnings for comparable jobs in San Francisco industry.

S: BLS - Bureau of Labor Statistics: A January 1961 survey of 99 San Francisco firms with employment of some 100,000.

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CIVIL SERVICE COMMISSION

TYPES AND FREQUENCY OF MATTERS CONSIDERED -- 1960

- - - - -

		Number
1.	Requests for permission to seek additional employment	130
2.	Requests for permission to participate in examinations or tests	90
3.	Appeals from rejection of applications	81
4.	Notices of dismissal	33
5.	Appeals from notice of dismissal	10
6.	Termination of probationary, temporary and interim appointments	222
7.	New litigation, referrals to City Attorney	6
8.	Referrals to Mayor	6
9.	Special meetings for items for referral to Board of Supervisors	5
10.	Miscellaneous and unfinished matters; requests for removal of name from list of eligibles; hearing requests from department heads to fill permanent vacancies with temporary appointment; to make non civil service appointments; and to amend certain rules concerning examinations; requests from General Manager of Personnel to re-classify certain positions; hearing requests from applicants to have name returned to list of eligibles; adoption of keys of examinations	146

III

RECOMMENDATIONS ON WAGE AND SALARY ADMINISTRATION

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Plan for Management and Professional	28
Plan for Trades and Crafts	28
Plan for Police and Firemen	28
Plan for Municipal Railway Operators	28
Exhibits VII to XI	..

III -RECOMMENDATIONS ON WAGE & SALARY ADMINISTRATION

We believe the recommendations in this section will require revision of Charter Sections 35.5.1, 35.5.2, 36.2, and 151, and repeal of Sections 151.1 and 151.3.

In order that the Chief Executive of the city may know the direction in which to move, we recommend that there be adopted the following general policies:

1. The average salaries of city employees should equal the average salaries of jobs of like work paid by San Francisco industry, or by other public jurisdictions in California for those jobs unique to the public service.

2. These average salaries should be determined by making salary surveys on a bench-mark basis with particular care taken to insure equality of city jobs with those being surveyed.

3. The salaries to be paid for city jobs should be determined by ranking them in accordance with a systematic plan of job evaluation to establish internal pay and job value relationships.

4. The job evaluation plan is to exclude only elective officers of the city whose salaries are to be determined by the electorate or the Board of Supervisors.

In order to implement these policies, we recommend:

1. That the city adopt an accepted industry practice of fixing the "prevailing rate" by averaging the salaries paid by other employers for the same or similar jobs. This is known as a "weighted average," and is determined by statistically weighting the salaries paid by the number of employees receiving that pay and striking an average.

2. That the city's jobs be grouped as follows to permit consideration of natural differences in pay plans, or because the size of the groups warrant separate pay structures:

   Non-Management, "white collar" jobs. We contemplate that clerical, technical, semi-professional, and group leader types of jobs be included in this category. (Certain manual jobs such as janitor, orderly, culinary workers, etc., formerly in this group, have been placed in the Trades and Crafts group).

   Management jobs, including supervisory and professional. We contemplate that this category include the higher level supervisory jobs as well as the professional, administrative, and executive jobs.

[illegible]

Police and Firemen. This group is separated because it is unique to the public service and its organization is more along military lines than commercial lines.

Municipal Railway Operators. The size of this group supports its own pay structure.

Because existing families of jobs have been maintained, the 17,000 employees under civil service would now follow this pattern.

	Present No. of Employees	Estimated Proposed No. of Employees
Clerical & Technical	9,400	5,800
Management	(part of 9,400)	1,600
Trades & Crafts	2,200	4,000
Police & Firemen	3,400	3,400
Municipal Railway	1,900	1,500

3. That the city take the necessary steps to develop and organize job descriptions. Fortunately, the city is in possession of current class specifications prepared by the Jacobs Company. While these class specifications were written more from the viewpoint of grouping as many jobs as possible into classes to ease the recruitment and examination process, they can be used in lieu of job descriptions and can be evaluated. It is recommended, however, that job descriptions be written for evaluation purposes. This would result in more than the 1,700 present class specifications, but the descriptions can be grouped for examination purposes if desired.

Plan for Group I - Clerical and Technical

The plan is shown in some detail in Exhibit VII. Essentially it provides for ranking the jobs by a point evaluation system, determining the average salaries of industry by bench-mark job survey, and constructing the salary ranges from minimum to maximum on a time-progression basis. Control of the general level of pay is maintained by equating the average cost of City pay with the average pay structure of industry.

Plan for Group 2 - Management and Professional

Fundamentally this plan is the same as for Group 1 with respect to job evaluation and salary survey, but provides a different method of administering salaries and for controlling the general level of pay. An illustration of this plan is in Exhibit VIII. With this group we recommend a merit system of salary progression, i.e., the individual's performance should be appraised and his salary increases should be determined by his performance on the job. Control of the general level of pay is maintained by equating the mid-point of the city's salary ranges with the average pay earnings of industry and other public jurisdictions.

Plan for Group 3 - Trades and Crafts

Exhibit IX illustrates our plan for this group. The objective is to equate city salaries with those of private industry having comparable working conditions and permanence of employment. This eliminates the construction industry.

Plan for Group 4 - Police and Firemen

In line with the recommended basic pay policies, this group should be paid an amount equal to the weighted average of other California cities. We believe, however, that only the largest cities can be considered because they are the ones which are most likely to have jobs comparable to the San Francisco positions. Details are shown on Exhibit X.

Plan for Group 5 - Municipal Railway Operators

Exhibit XI outlines our recommendation for this large group of employees. It is also based on the general policy of paying average salaries for comparable jobs based on survey of the largest cities in California.

EXHIBIT VII

SALARY PLAN FOR CLERICAL AND TECHNICAL JOBS

We estimate there are some 500 classes of positions in this group. To determine what industry's average earnings are, a salary survey should be made of bench-mark city jobs selected as a cross section from the lower paying jobs to the higher paying jobs. The bench-mark jobs should also meet these requirements: They can be found in private industry; are performing essentially the same duties; have relatively equal job value, and have sufficient employee population to make the comparison valid. It is suggested that the present use of the Bureau of Labor Statistics to gather salary data be continued.

At the same time, internal job value relationships establishing the relative ranking of these bench-mark jobs, as well as all other jobs, should be determined through the use of modern job evaluation techniques. We suggest use of a Point Factor system with some 8 - 10 job factors. This type of system is best utilized when a wide variety of intangible skills, such as is found in clerical and technical jobs, makes it desirable to break down the jobs and evaluate each of the job factors.

The present five steps to progress from minimum through intermediate to maximum salaries should be retained on a time progression basis.

The salary data should then be plotted to obtain a salary curve. This is illustrated in Example A. The technique of plotting the salary curve should be as follows:

1. Plot the weighted average of industry's actual salaries for each of the bench-mark jobs against its point or rank value established by job evaluation.

2. Construct a straight line which best fits the entire group of plotted points. (Line X.)

3. Determine the average step in the salary range of city employees occupying each of the bench-mark jobs.

4. Consider that the constructed straight line represents the average step of city pay, and from this, determine the intermediate, or third step, and draw a new line. (A sampling of the pay of city employees on jobs surveyed by B.L.S. indicated that average pay of city employees is a little above the fourth step. Our example uses the fourth step.) (Line M.)

5. Select a point near the beginning of the new line, being influenced by the groupings of the plotted jobs, and establish this point as the intermediate, or third, step of the first salary grade. (Point A.)

6. Construct additional intermediate points along the line at some desired percentage of the dollars intersected by the preceding point. (Points B.)

7. Construct verticals at some desired percentage of each intermediate point, thus establishing the spread of evaluation points applicable to the salary grade. (Lines V.)

8. Determine a uniform percentage spread between the first step and the fifth step of the salary range, and construct horizontal lines representing this spread above and below each intermediate step. (Lines H.)

9. Abstract from this chart information to develop salary grade compilations specifying point values. (See Example B.)

After the salary curve is drawn and salary grades are developed for bench-mark jobs, assign salary grades to each of the remaining jobs in accordance with the point value established by job evaluation.

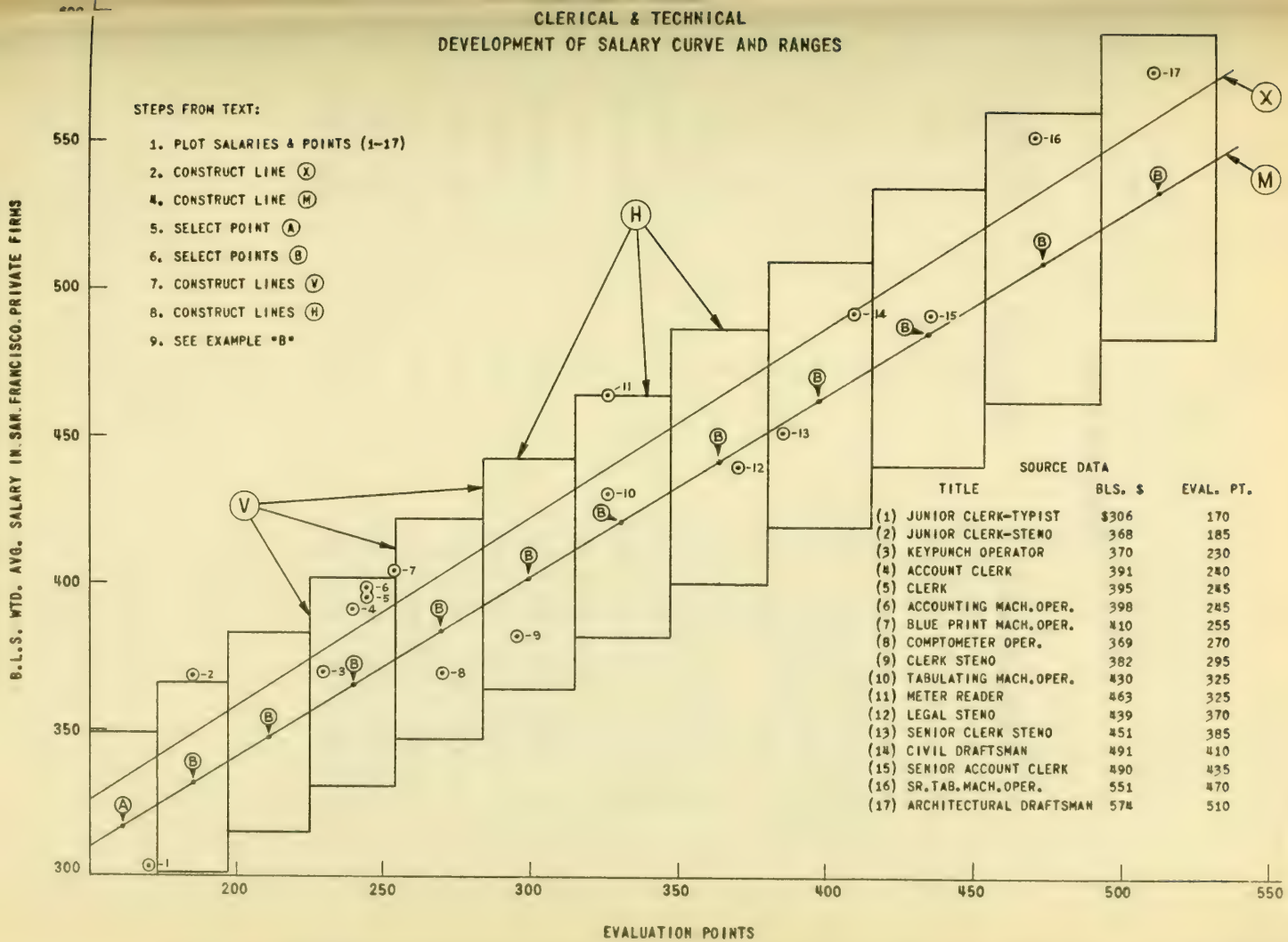
The next step is to identify the city's employees as to job and salary grade. For those whose salaries are above the maximum, do not reduce salary; but increases should not be given until the range maximum permits. For those whose salary is below minimum, bring salary up to minimum. For those whose salary falls between the new step rates, bring salary up to the next highest step.

After this, the program should be maintained in current condition. The relative ranking of jobs should be maintained not only by a re-appraisal of individual jobs as requested by department heads, but also by periodic audits to insure that employees are correctly identified by job and salary grade. We suggest that these audits be made at least every two years.

In connection with maintenance of salary curve data, surveys of the bench-mark jobs, in essentially the same manner as the first survey, should be made in order to raise or lower the entire curve on the basis of the per cent change in the bench-mark jobs properly weighted. We suggest a salary survey be made annually.

There may be times when a short supply of certain skills in the labor market will necessitate paying beyond the internal relationship determined by job evaluation. The jobs affected should be treated as temporary exceptions. It should be the responsibility of the Board of Supervisors to authorize the exceptions for a specific period, when supported by turnover figures and by certification that applicants for the positions in question are in short supply.

CLERICAL & TECHNICAL
DEVELOPMENT OF SALARY CURVE AND RANGES



SOURCE DATA

	TITLE	BLS. $	EVAL. PT.
(1)	JUNIOR CLERK-TYPIST	$306	170
(2)	JUNIOR CLERK-STENO	368	185
(3)	KEYPUNCH OPERATOR	370	230
(4)	ACCOUNT CLERK	391	240
(5)	CLERK	395	245
(6)	ACCOUNTING MACH. OPER.	398	245
(7)	BLUE PRINT MACH. OPER.	410	255
(8)	COMPTOMETER OPER.	369	270
(9)	CLERK STENO	382	295
(10)	TABULATING MACH. OPER.	430	325
(11)	METER READER	463	325
(12)	LEGAL STENO	439	370
(13)	SENIOR CLERK STENO	451	385
(14)	CIVIL DRAFTSMAN	491	410
(15)	SENIOR ACCOUNT CLERK	490	435
(16)	SR. TAB. MACH. OPER.	551	470
(17)	ARCHITECTURAL DRAFTSMAN	574	510

EXAMPLE "A"

SALARY GRADE TABLE

Evaluation Point Spread	Salary Grade	5-Step Salary Range
125 - 148	1	$273 - 287 - 301 - 316 - 332
149 - 173	2	287 - 301 - 316 - 332 - 349
174 - 197	3	301 - 316 - 332 - 348 - 366
198 - 225	4	315 - 331 - 347 - 365 - 383
226 - 253	5	331 - 348 - 365 - 383 - 402
254 - 283	6	347 - 364 - 383 - 402 - 422
284 - 314	7	364 - 382 - 401 - 421 - 442
315 - 346	8	381 - 400 - 420 - 441 - 463
347 - 379	9	400 - 420 - 441 - 463 - 486
380 - 414	10	419 - 440 - 462 - 485 - 509
415 - 452	11	439 - 461 - 484 - 508 - 534
453 - 491	12	461 - 484 - 508 - 534 - 560
492 - 529	13	483 - 507 - 533 - 559 - 587
530 - 568	14	507 - 532 - 559 - 587 - 616
569 - 608	15	532 - 559 - 587 - 616 - 647
609 - 649	16	558 - 586 - 615 - 646 - 678

SALARY PLAN FOR MANAGEMENT JOBS

At the present time the city has about 900 employees who are exempt from the payment of overtime. It is estimated that another 700 employees could logically be included as management due to the supervisory, administrative, executive, or professional nature of their jobs.

Management-level jobs should be ranked according to their relative difficulty, utilizing modern job evaluation techniques.

The weighted average salary paid to selected bench-mark jobs should be determined by careful surveys in private employment and in other public jurisdictions.

A salary curve should then be constructed following the procedures outlined for the clerical and technical group. (Exhibit VII.) However, because our recommendation is to use merit progression for management personnel, in contrast to time-progression, the salary grade mid-points (rather than the fourth step) should equate to the weighted average salaries developed by the survey. This plan is illustrated in Example C.

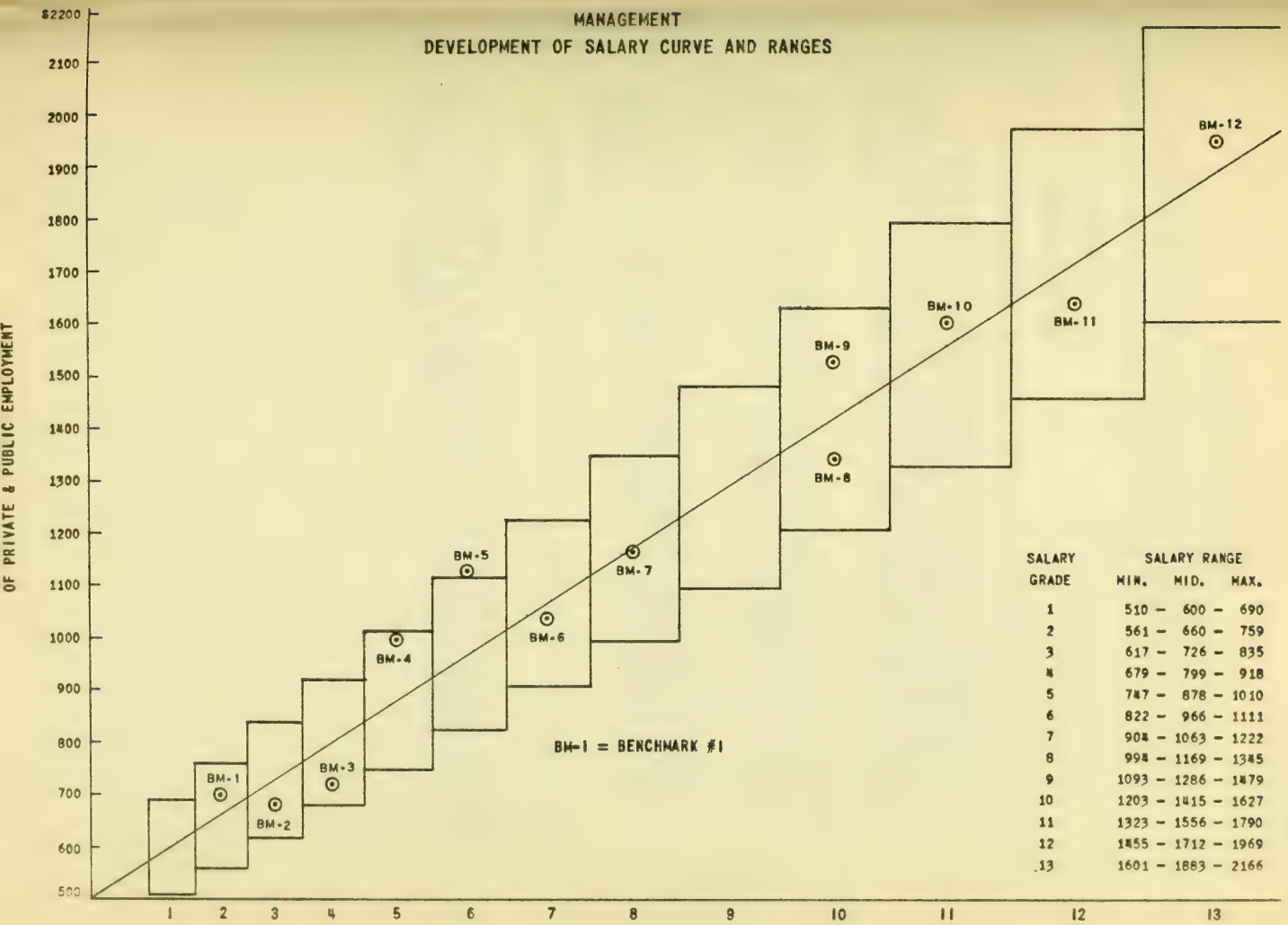
Subsequent salary surveys will disclose changes in the level of salaries for the bench-mark jobs, at which time proper adjustment can be made to the salary curve and the resulting ranges. If the ranges are increased, top management must then decide between a general increase for all, or individual merit increases for the better performers.

The determination of the percentage increment between mid-points and the salary range spread from minimum to maximum should also be the responsibility of top management. This duty should be assigned to the proposed Management Development Committee, together with the responsibility for over-all administration of management salaries. (See Exhibit XII for organization.)

In the over-all administration of management salaries, this Committee must also determine the policies necessary to maintain the effectiveness of the merit progression program; giving consideration to the size of the merit increase budget, how it will be applied, and the source of the funds.

EXAMPLE "C"

MANAGEMENT
DEVELOPMENT OF SALARY CURVE AND RANGES



SALARY GRADE	SALARY RANGE MIN.	MID.	MAX.
1	510	600	690
2	561	660	759
3	617	726	835
4	679	799	918
5	747	878	1010
6	822	966	1111
7	904	1063	1222
8	994	1169	1345
9	1093	1286	1479
10	1203	1415	1627
11	1323	1556	1790
12	1455	1712	1969
13	1601	1883	2166

SALARY PLAN FOR
TRADES AND CRAFTS JOBS

In order to provide the flexibility necessary in a market containing, at times, major changes in the general level of pay, the Trades and Crafts group should be subdivided into:

1. Mechanical

2. Plant Operating

3. Miscellaneous (Service, Custodial, Domestic, etc.)

Each of the positions specified for inclusion in the Trades and Crafts group should be evaluated into a pay grade via some system which measures relative job difficulty, working conditions, and required prior experience, education, or training. It is intended that the system will be maintained to reflect constantly current job relationship.

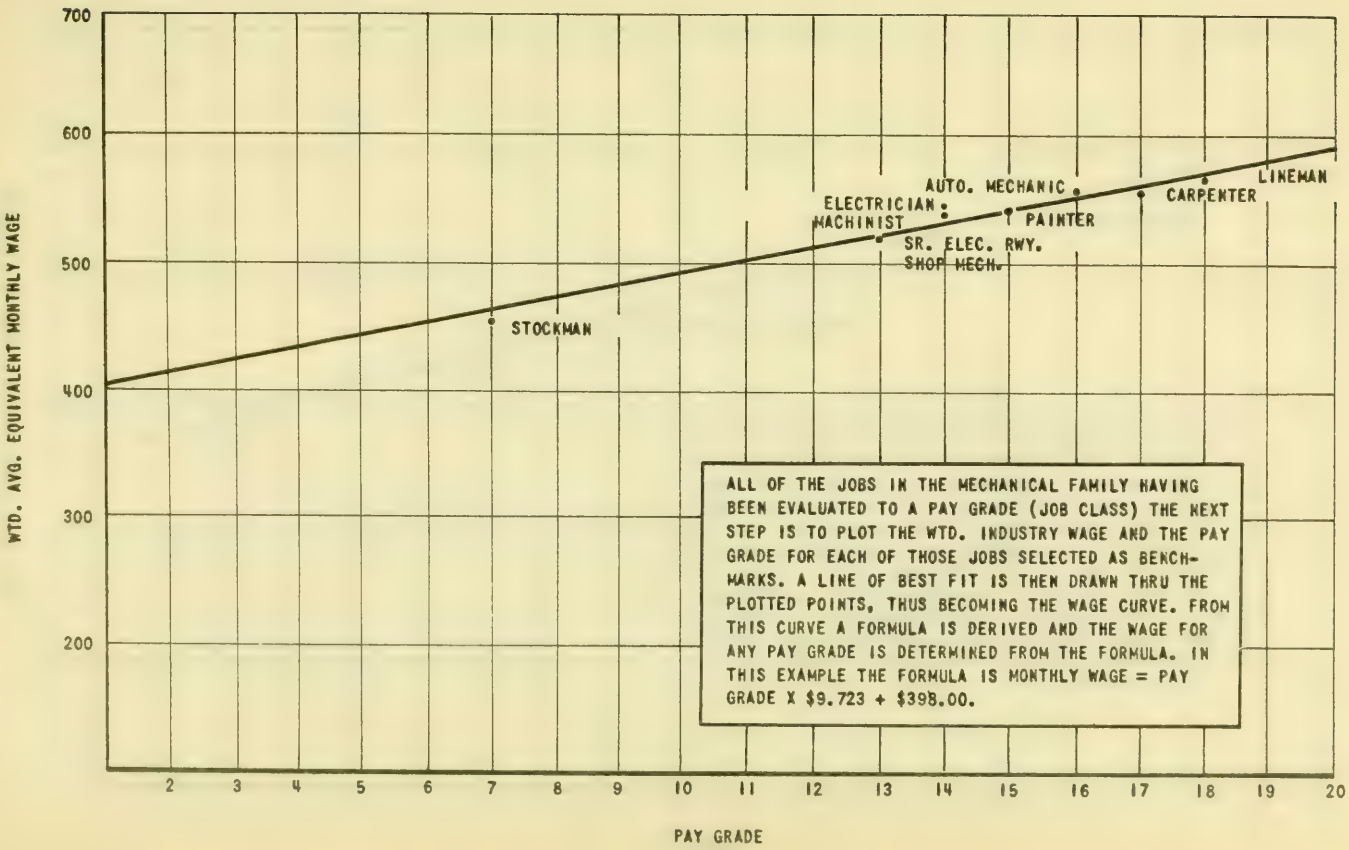
Bench-mark positions will be selected from each of the sub-groups (Mechanical, Plant Operating, and Miscellaneous) on the basis of: (1) their comparability with positions in private employment, and/or other public jurisdictions in the Bay Area, and (2) a significant number of incumbents, both inside and outside of city employ.

Initially, a survey of these jobs in Bay Area employment should be made by the city for the purpose of establishing wage structures applicable to city employees. We suggest use of the Bureau of Labor Statistics for this purpose. (Examples D, E, and F illustrate this technique.)

Subsequent periodic surveys should be made to adjust the level of these wage structures.

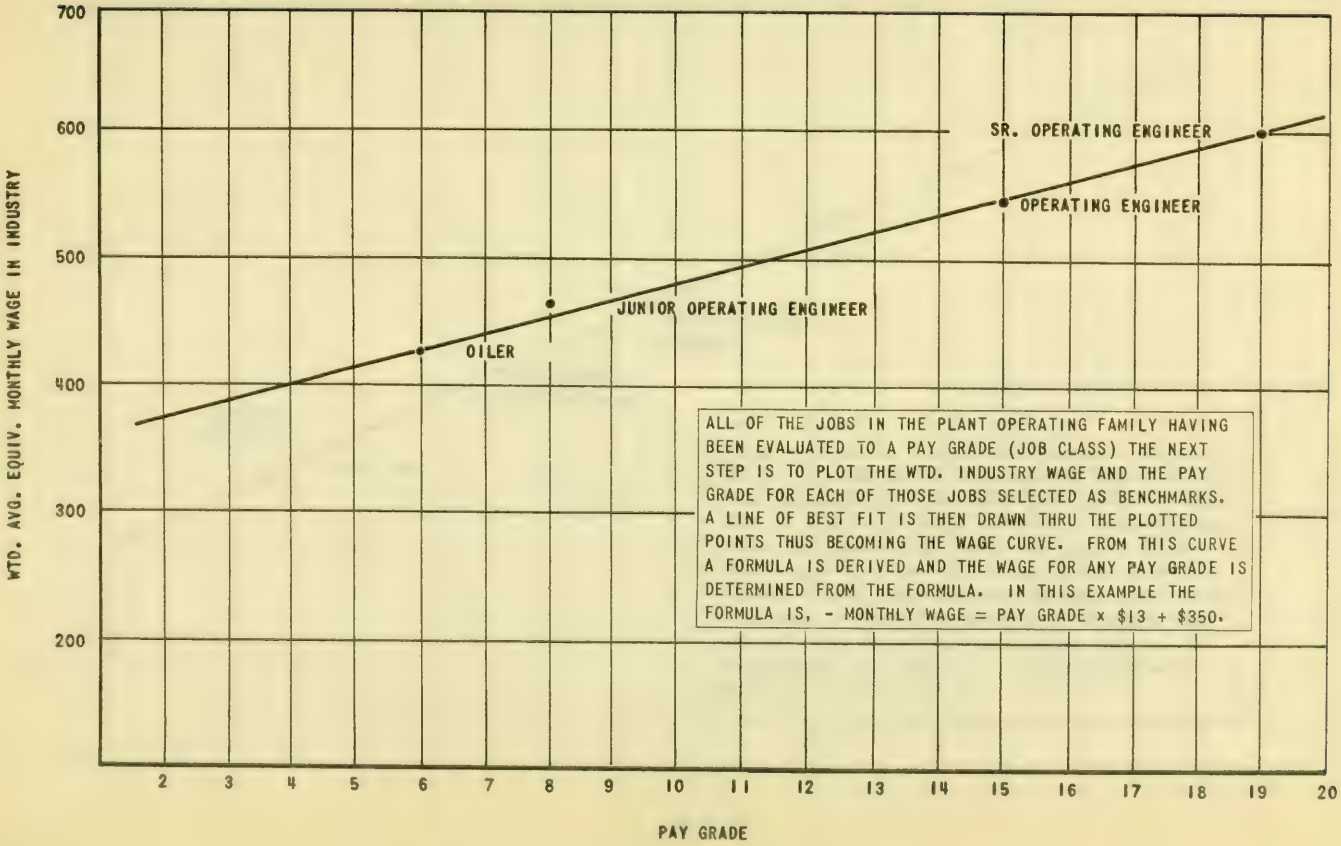
These surveys will disclose the weighted average hourly rate of pay for each of the bench-mark jobs, exclusive of any fringe benefits. It is recommended that uniform benefits (overtime, vacations, holidays, health, and pensions) should be applied to all city employees (Police and Firemen excepted).

MECHANICAL
DEVELOPMENT OF WAGE CURVE



EXAMPLE "D"

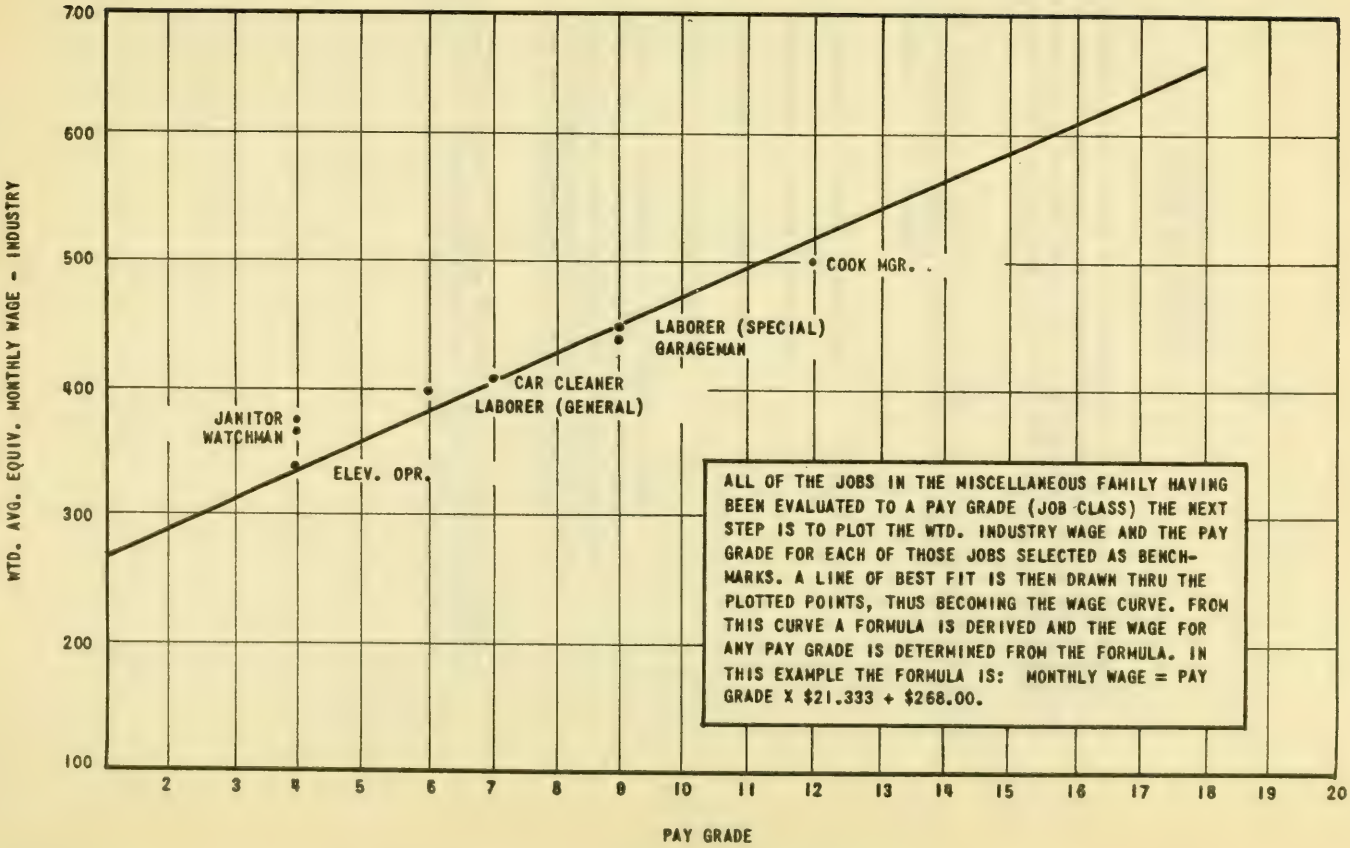
PLANT OPERATING
DEVELOPMENT OF WAGE CURVE



ALL OF THE JOBS IN THE PLANT OPERATING FAMILY HAVING BEEN EVALUATED TO A PAY GRADE (JOB CLASS) THE NEXT STEP IS TO PLOT THE WTD. INDUSTRY WAGE AND THE PAY GRADE FOR EACH OF THOSE JOBS SELECTED AS BENCHMARKS. A LINE OF BEST FIT IS THEN DRAWN THRU THE PLOTTED POINTS THUS BECOMING THE WAGE CURVE. FROM THIS CURVE A FORMULA IS DERIVED AND THE WAGE FOR ANY PAY GRADE IS DETERMINED FROM THE FORMULA. IN THIS EXAMPLE THE FORMULA IS, - MONTHLY WAGE = PAY GRADE x $13 + $350.

EXAMPLE "E"

MISCELLANEOUS (SERVICE, CUSTODIAL, DOMESTIC, ETC.)
DEVELOPMENT OF WAGE CURVE



ALL OF THE JOBS IN THE MISCELLANEOUS FAMILY HAVING BEEN EVALUATED TO A PAY GRADE (JOB CLASS) THE NEXT STEP IS TO PLOT THE WTD. INDUSTRY WAGE AND THE PAY GRADE FOR EACH OF THOSE JOBS SELECTED AS BENCH-MARKS. A LINE OF BEST FIT IS THEN DRAWN THRU THE PLOTTED POINTS, THUS BECOMING THE WAGE CURVE. FROM THIS CURVE A FORMULA IS DERIVED AND THE WAGE FOR ANY PAY GRADE IS DETERMINED FROM THE FORMULA. IN THIS EXAMPLE THE FORMULA IS: MONTHLY WAGE = PAY GRADE X $21.333 + $268.00.

EXAMPLE "F"

SALARY PLAN FOR
POLICE AND FIREMEN

The monthly base salary for a policeman or a fireman beginning his fourth year of service, and thereafter, should equal the weighted average salary paid for the same job in California cities larger than 100,000 population. We suggest such weighted average be determined annually.

All of the other uniformed, or badged, jobs in either department, except Chief and Deputy Chief, should receive percentage differential over base salary. For example:

Sergeant,	Police Department	13.5%
Lieutenant,	Police Department	25
Lieutenant,	Fire Department	15
Captain,	Fire Department	25

(Note: As suggested in the report of the Task Force which studied the Police Department, it is possible that the salary relationships among management positions in the Police and Fire Departments need to be realigned.)

Salaries for Chiefs, Deputy Chiefs, and all other department personnel could be determined under the salary plan (Clerical and Technical Plan or Management Plan) applicable to the particular position.

Using the most recent data available from the Civil Service Commission, the following tabulation shows what San Francisco would pay to policemen and firemen under the proposed method of calculation:

City	Total number Policemen and Firemen	1-1-1961 Maximum Base Salary	Total Number x Maximum Base
Anaheim	137	$543	74,391
Berkeley	182	570	103,740
Fresno	337	563	189,731
Glendale	176	579	101,904
Long Beach	722	587	423,814
Los Angeles	5,245	575	3,015,875
Oakland	888	596	529,248
Pasadena	165	555	91,575
Sacramento	377	575	216,775
San Diego	752	587	441,424
San Francisco	2,519	596	
San Jose	337	578	194,785
Santa Ana	165	565	93,225
Torrance	113	578	65,314
Total	9,596		5,541,802

Weighted Average = $578

SALARY PLAN FOR STREETCAR AND BUS OPERATORS

Wages for San Francisco's streetcar and bus operators should equal the weighted average of salaries for similar work on those systems operating in California municipalities whose population is greater than 100,000.

As designated by the management of the Municipal Railway System, the salaries for certain other S-class jobs, considered to be in a logical promotional line from operator, should relate directly to the operator rate of pay. For example: Inspector, Municipal Railway, should, unless there is a change in job content, continue to receive a rate 30% higher than bus operator.

Based on the most recent data available, the rate for operator would be calculated as follows:

City	No. of Operators	Present Hr. Rate	Present Equiv. Mo. Rate	No. x Hr. Rate
Berkeley	(with Oakland)	$ --	$ --	$ --
Fresno	57	2.21	383	126
Glendale	26	2.06	357	54
Long Beach	211	2.26	392	477
Los Angeles	2,664	2.49	432	6,633
Oakland	875	2.55	442	2,231
Pasadena	81	2.25	390	182
Sacramento	153	2.42	419	370
San Diego	440	2.47	428	1,087
San Francisco	1,950	2.6025	451	--
San Jose	74	2.23	387	165
Torrance	22	1.79	310	39
Total	4,603			$11,364

Weighted Average = $2.47

IV

RECOMMENDATIONS ON REORGANIZATION OF THE CIVIL SERVICE FUNCTION

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IV. Recommendations on Reorganization of the City's Civil Service Function

We believe the recommendations in this section will require a major recasting and redefinition of the charter provisions governing the Civil Service function (Sections 140 through 157).

Attached as Exhibit XIX is a chart depicting our proposal for a Personnel Department which will provide modern management techniques contributing to the development of a highly productive force and generating the level of morale needed to make city government a cohesive unit.

In formulating the recommendations for reorganization of the city civil service function, we were guided by the following objectives;

1. To continue those functions of the present civil service system that prevent undue political pressure in making appointments to jobs and in administering personnel relations.

2. To establish a positive personnel management viewpoint that will result in a vigorous program of attracting, selecting, developing, and retaining well-qualified personnel devoted to the best interests of the city.

3. To encourage and permit the maximum desirable participation of operating departments in decisions affecting values of jobs and of employees, training and development, and recruitment and retention of an able staff.

Civil Service Commission

The present Civil Service Commission should absorb the additional functions of the retirement and health service plans. It should be expanded to seven members and technical skills should be represented in these categories: personnel, insurance, banking, medical, and legal. Its major functions will be to hear appeals on administrative decisions affecting city employees and to give advice and counsel to the Personnel Director.

Another important and vital duty would be to safe-guard the merit system. It should receive basic management type reports on personnel activities which will permit appraisal of results. These reports, coupled with information developed on hearing appeals, should provide sufficient information for the commission to know whether the job being done by the Personnel Director is satisfactory. If they find it is not, they should recommend corrective action, including separation of the Personnel Director, to the city's administrative head.

The Personnel Director should be appointed by the city's administrative head and should be accountable to him for results. His duties are to administer the city's personnel function through the various sections of the Personnel Department.

Employee Relations

The major purpose of the Employee Relations section is to maintain continuous contact with city employees to determine status of morale. It is contemplated that they will periodically visit line departments thereby making themselves available should any employee want to discuss a problem. Employees may contact this section through their own supervisors whenever they feel they require counsel and advice on personal problems, job-connected or otherwise. The Employee Relations section should settle grievances, have contact with employee representatives, make exit interviews when desirable, give pre-retirement advice, encourage employee recreational and social groups, and handle any other matters relating to the employee on-the-job. While they should give all consideration possible to the employee's problems and requests, they also should bring to bear a management viewpoint on the problem at hand. These contacts will provide information and data on the status of employee morale. General concepts and conclusions should be reported to management so that they may be considered in the planning and implementation of major personnel programs.

Recruiting and Examination

Flexibility should be installed in the present rigid requirements for examinations to develop lists of eligibles. There are quite a few entrance jobs, such as Clerk-typist, Clerk-steno, Orderly, for which formal examination announcements and eligible lists could be eliminated when the number of job openings exceeds the number of applicants. In these circumstances, jobs should be filled on a first come-first served basis after a reasonable qualifying test of the skills required. As soon as the number of applicants exceeds vacancies and undue political pressure is brought on this section for selection of certain individuals, the Civil Service Commission could require formal examinations and eligible lists.

While formal examinations may be the most desirable way of selecting individuals for promotions, we believe the procedure should be limited to non-management jobs. In this area, technical skill is paramount and the formal examination process is possibly the best way to determine this. On the other hand, management jobs require the rare skills of working through other people to obtain results. These skills are intangible and we do not believe they can be ascertained through examinations. Therefore, the examination procedure should be limited to non-management jobs. An examination for a management job should be necessary only when there is no qualified person already in the city service.

If department heads are to be held accountable for the work of their employees, it would be desirable that they be permitted more leeway in finally selecting applicants for job vacancies. We recommend elimination of the present mechanical, impersonal system of confining selection only to the top name on the eligible list and substitute instead a more realistic and flexible approach of selecting from among the top five names for non-management jobs. We believe this would encourage appointment of the most suitable candidate which is the goal of the entire recruitment and examination process.

The section should be given an adequate advertising budget to permit a vigorous campaign of developing sources of supply and of making more personal appeals to applicants, particularly in the professional ranks.

Benefits

We believe the present separate functions of health insurances and the retirement plan should be administered under the Personnel Director. This section would handle paper work and maintain the necessary records. Borderline cases should be decided by the Civil Service Commission. The necessary investment of funds should be handled by the proposed Director of Finance.

Wage and Salary Administration

Most of this subject is covered in Section XXX of this report. In addition, we suggest the use of a Job Evaluation Committee to evaluate jobs based on descriptions prepared by analysts of this section. This committee should be composed of seven high ranking line department people who should serve on the committee for a term of 3 - 5 years. As terms expire, new people should be appointed so that job evaluation techniques can be understood by as many as possible and to provide opportunity for line personnel to learn about city-wide problems. Appointments are to be made by the city's administrative head upon recommendation of the Personnel Director.

Administrative Services

A section to take care of the "house keeping": files, service records, typist and stenographic pools, supplies, desks, telephone service and other similar matters.

Research

To keep abreast of the latest developments in the personnel field including employee benefit programs is a major duty of this section. The other major function would be to show the condition of personnel activities; turnover, age, length of service, relation of salaries to control points of salary ranges, reasons for separation, number of job vacancies, number and size of salary increases, and other similar matters.

Training

The major purpose of this group is to train the employee on the job to do his job better and to help him prepare for advancement. This group should work very closely with the line departments in developing training manuals and courses of instruction. It should also publish a house organ for city employees.

Management Development

This section should perform the staff work for the Management Development Committee.

To implement a management development program a committee of the city's top management should be organized. The committee is to be known as the Management Development Committee and should be composed of seven members: the Mayor, the city's administrative head, the Personnel Director, the Budget Director, and three of the line department directors on a rotating basis.

The Committee's major objective should be to develop future management personnel on a planned purposeful basis so that qualified individuals will be available when vacancies occur. In addition, a major activity of the Committee should be the development and overall coordination of the Management Salary Plan.

All management personnel will come under the purview of this Committee. Performance reports and reports on estimates of potential will be required on each person at the management level.

At the lower levels, for instance those persons receiving $500-600 per month, the Committee should limit its duties to passing upon recommendations for salary increases. This will permit them to become acquainted with the available personnel. Between $600-800, the Committee should begin to make plans for the individual's future development. At over $800, the Committee should approve definite programs, tailored to the individual's needs and to the requirement of the city for managerial talent.

To accomplish its objective, the Committee should have authority to place management level people in any job in any department that will fit into the individual's development program. It is contemplated that only infrequently will a position have to be filled from outside. In these cases, a competitive examination should be given to bring the men into the city service.

If the management development program is to be successful, the Committee should also have authority to demote or dismiss those individuals who, after a reasonable and fair opportunity, do not display the necessary aptitudes or whose performances on the higher jobs are not satisfactory.

Suggestions Committee

This function is shown as part of the Personnel Department but it could be assigned to some other staff unit. We believe that, to be successful, a suggestion program must have strong leadership and proper publicity. We think that the required direction and coordination can be provided by the Personnel Director.

The Committee would make final decisions as to the value of the suggestions and award prizes accordingly. The Committee should be composed of seven members drawn from the operating departments.

Payroll

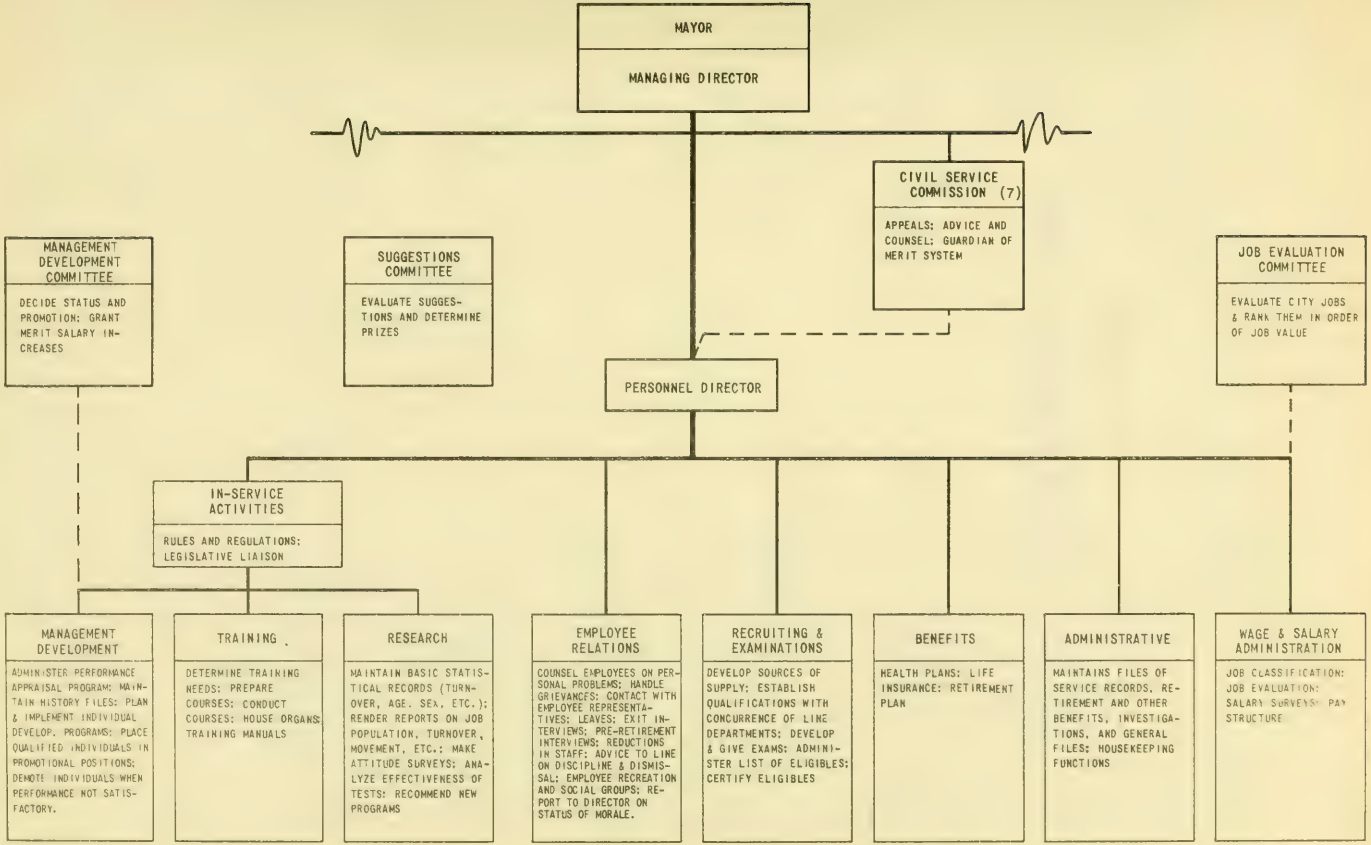
This unit has not been provided for in the proposed organization. The handling of payrolls and related records is an accounting function and should be done on modern tabulating equipment.

We believe that a simplified procedure to authorize changes in an individual's pay status, the use of tabulating equipment producing checks or warrants requiring endorsement by the employee for encashment, and a reasonable periodic audit by a disinterested group, is sufficient safeguard to prevent manipulation for dishonest reasons.

This method would eliminate the present costly, time-consuming clerical procedure and would eliminate the need for some 10 employees.

EXHIBIT XII

ORGANIZATION OF CIVIL SERVICE - PROPOSED



V

S A V I N G S

Comments and Summary of Savings

Savings

The Task Force and its Advisory Committee believes the recommendations on wage and salary administration will result in competitive wages. The salary levels that will result from the proposals will permit the city to obtain its fair share of the labor market and to retain the employees it is able to attract.

We would like to point out that other incentives apart from the general level of salaries should be emphasized: permanence of employment, training programs, promotional opportunities, and perhaps, if conditions warrant, incentive pay for outstanding performance at the management level and length of service pay increments for superior non-management employees.

Our recommendations have been made on this basis. If they are accepted and implemented we believe the city can make the following savings on its payroll:

1.	Clerical & Technical	$4,000,000
2.	Management	no estimate
3.	Trades & Crafts	2,500,000
4.	Municipal Railway operators	500,000
5.	Police & Fire	800,000
	Total	$7,800,000

In estimating this total savings, the Task Force utilized existing data. We believe the savings of $7,800,000 is conservative and can well reach $10 million.

In calling these reduced costs "savings" we do not intend to suggest that salaries should be cut but rather that the savings will accrue by denial of salary increases until such time as the average earnings of industry reach the average salaries paid to city employees. At the present rate of the rising economy, this should take place in 2 or 3 years.

With regard to the recommendations dealing with the reorganization of the city's civil service function, we believe that if the experience of modern organizations is used as a criterion, the additional savings to be realized from a productive force with high morale would be substantial.

REPORT
WITH RECOMMENDATIONS
CONCERNING THE ACTIVITIES
OF THE PURCHASING DEPARTMENT
OF THE CITY AND COUNTY
OF SAN FRANCISCO

BY THE
PURCHASING DEPARTMENT
TASK FORCE OF THE
MAYOR'S COMMITTEE FOR MUNICIPAL MANAGEMENT

Mr. Marshall G. Mustain
Project Director
Mayor's Committee for Municipal Management
San Francisco, California

Dear Mr. Mustain:

The Purchasing Department Task Force has completed a comprehensive review of the functions and activities of the San Francisco Purchasing Department with the objective of discovering opportunities for improving the organization, administration and operations and making constructive recommendations for betterments and economies. Its report is submitted herewith.

While it was originally intended to cover only the purchasing functions, it soon developed that other non-related activities were presently included in the Purchasing Department organization which are not normally considered to be a purchasing agent's responsibility. Consequently, the scope of the survey had to be considerably expanded in order to determine the extent to which similar functions and activities were being performed in other departments within the City government.

The method of approach included preparation of a general outline of procedure, as these applied to the office and field operation of the various organizational subdivisions. Information was gathered by conferences with department heads, their assistants and the supervisors of the separate activities, followed by personal observations of actual operations and procedures at all locations. In addition, extensive research was carried on covering private industry practices and those in other comparable governmental jurisdictions.

The recommendations represent a distillation of survey, research and the combined thinking and judgment of the Task Force. Later this material was "test checked" with the department administrative and supervising personnel concerned and revised as necessary.

The Task Force acknowledges and appreciates the fine cooperation received from all levels of management, supervisors and individual employees. In a number of instances management has already accomplished some of the matters covered in the report and has initiated corrective measures, which is a commendable attitude.

Douglas Holcomb
Chairman

Joseph F. Rum

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TITLE

Section Number	Exhibit Number	
I	I	Organization Chart of Present Purchasing Department
III	II	Organization Chart of Proposed Purchasing Division
IV	III	Organization Chart of Proposed Central Motorized Equipment Department
V	IV	Organization Chart of Proposed Central Services Department
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INTRODUCTION AND SUMMARY

General

The Task Force assigned to survey the organization, administration and activities of the Purchasing Department herewith submits its report of findings and recommendations.

While at first it was presumed that the efforts were to be primarily directed at the City-County-wide purchasing function and related activities, it soon became apparent that this subdivision of the total organization structure embodied other non-related activities and services such as Central Garage and Shops, Reproduction and Tabulating. The scope of the survey was broadened to include these matters, both in the Purchasing Department and in other City government units conducting automotive repair or tabulating operations. In addition, the formation of a Central Services Department, containing some existing activities and several new activities was considered.

Each of the organizational subdivisions was studied separately by interviewing and conferring with the department administrators, their assistants, supervisors and staff personnel, both in the offices and at the various field locations. Subsequently the preliminary observations and conclusions were reviewed with the top level department management and the respective principals concerned.

The subject report is divided into the following sections:

I. Organization and Administration
II. Bureaus of Buying, Personnel and Accounts
III. Bureau of Equipment and Supplies
IV. Bureau of Shops
V. Bureau of Tabulating and Reproduction

The Findings with reference to each of these subdivisions are presented first, usually in the form of a general statement followed by several pertinent numbered paragraphs dealing with specific matters. At the conclusion of each section, a series of Recommendations are made which relate to these findings and embody the combined thinking and judgment of the Task Force.

The following summary paragraphs touch briefly on some of the salient and important aspects, under each of the above sectional headings.

I. Organization and Administration

The present organization of the Purchasing Department should be revised to conform to good practice in both private and public jurisdictions and the unrelated functions recognized and organized separately, leaving only buying and stores functions under the purchasing organization. The recommended organization structure, including other currently existing and proposed activities, would be as follows:

Central Purchasing Division

1. Bureau of Buying
2. Bureau of Personnel and Accounts
3. Bureau of Equipment and Supplies

Central Motorized Equipment Department

1. Central Shops
   a. Automobile Shop
   b. Truck Shop
   c. Fire Shop
   d. Motorcycle Shop (new activity)
   e. 7 Auxiliary Shops
2. Branch Service Stations
3. Passenger Car Pool (new activity)
4. Management and Accounting

Central Services Department

1. Reproduction Service
2. Photostat Service
3. Photograph Service
4. Offset Printing and Duplicating Service
5. Telephone Service (now under Department of Public Works)
6. Public Information Service (now under Department of Public Works)
7. Office Equipment Maintenance (new activity)
8. Records Retention and Disposal (now under Director of Finance and Records)
9. Messenger Service (new activity)
10. Mailing Service (new activity)
11. Clerical, Typing and Stenographic Pool (new activity)

Central Data Processing Division

1. City Hall (2-shift operation)
2. Hall of Justice
3. Management and Accounting

II. Bureaus of Buying, Personnel and Accounts

Entirely too much time and effort are being devoted to the processing of requisitioning and purchasing documents, nearly two-thirds of the purchase orders dealing with amounts under $100, detailed analyses indicating that many of these are for less than $2.

As a consequence, buyers are obliged to devote considerable time to such details and routines and naturally cannot concentrate on the more important aspects of specification preparation, determining quantities to be purchased, prices to be paid, selecting vendor sources, studying markets, searching for better and more economical sources of supply and substitute materials, etc.

Recommendations are made to correct and improve the various phases of procurement activities to effectuate betterments, especially through considerable delegation of authority and responsibilities for making small purchases up to $100 at the departmental level.

In general the mechanics of preparing and processing the purchasing forms were found to be satisfactory with some improvements being feasible in the clerical, typing and related procedures and in the solicitation of quotations and bids.

Timekeeping and payroll procedures were also noted for improvements such as uniformity of forms and procedures to simplify and expedite daily time reporting.

Suggestions have been made for improving the budgetary accounting, control and monthly reporting for the information and guidance of the department head and others concerned.

III. Bureau of Equipment and Supplies

This subdivision involves the administration of 21 separate departmental storerooms. Though apparently intended to be "centralized" in the Purchasing Department, the arrangement may be classified as a "decentralized" stores system. The survey stressed the two principal phases of good storekeeping:

a. Physical aspects of storing and handling commodities, materials and supplies.

b. Control, replenishment, issuance and accountability for items and quantities stored.

In general, when measured against normally recognized good storekeeping practices, there are opportunities for making considerable improvements in both these phases.

There appeared to be little evidence of sufficient attention having been given to the location, space requirements, design, construction and layout of so many specific stores facilities to serve such a far-flung organization as the City-County. This applies particularly to what, where and how much is to be stored at each location.

In some instances buildings are in dilapidated condition; storeroom layouts are unsatisfactory to fair; considerable makeshift wooden bins and shelving were observed ranging from poor to satisfactory condition. Identification and location of stored items, storing methods in use, materials handling equipment, safety and protection were found deficient at a number of locations. Some storage yards are in need of improvement to effect more orderly and safeguarded outdoor storage.

Inventory systems and records were found to be non-uniform from storeroom to storeroom, and posting issuances, receipts and balances on hand were not always kept current. Indications of minimums and maximums to be carried in stock were consistently absent. Under these circumstances the establishment and maintenance of complete, accurate inventory systems at all locations is believed difficult.

Such records as are available indicate, in general, that stocks on hand at the various locations range from 5.7 to 20.2 months of the normal needs, suggesting a possibility of reduction in inventory values of around $750,000. A considerable portion of this excessive inventory consists of obsolete and unneeded items.

The Central Warehouse is not being utilized to fullest extent in storing items commonly used by all departments. Expansion of these facilities could result in comparable reduction of inventories at the separate locations.

IV. Bureau of Shops

This present subdivision of the Purchasing Department is responsible for the servicing and maintenance and repair of about 1,300 motor vehicles assigned to 34 different departments; the work being performed principally at the Central Shops in the southeastern section of the City. Although designated as central shops, there are a number of other separate repair and servicing operations being performed throughout the City and the scope of the activities still remains widely scattered and the span of supervision necessarily thin. This also results in a considerable amount of supervision on a separate departmental basis, leading to the conclusions that the effectiveness of this type of organization is not the most desirable and consequently the consolidation of some of these separate activities would be advisable.

The present excellently constructed buildings at the Central Shops present opportunities for expanding the scope of activities to provide for a Central Motorized Equipment Department for handling of substantial maintenance and repair jobs on automobiles, trucks and motorized equipment units, leaving a number of the present branch facilities to serve principally in rendering "gas station" service and making minor repairs.

An effective preventive maintenance program is proposed to be established at the Central Shops.

The "ownership" of all automotive vehicles and motorized equipment will be vested in the Central Motorized Equipment Department which will thereafter be responsible for all maintenance, repair and incidental services, including replacements and new acquisitions.

An over-all accounting system and cost control is proposed as part of the centralized department operations for the purpose of establishing a uniform schedule of monthly rates for different types, makes and models of automobiles, trucks and other equipment now in use.

It is also intended to establish a centralized passenger car pool in the Civic Center area, with the possibility of one or two centrally-controlled branches at outlying areas.

V. Bureau of Tabulating and Reproduction

As presently established, the Reproduction Bureau may be considered a possible nucleus for the development of a city-wide central services agency, it being now limited to blueprinting, photostating, photography and offset duplicating services. It is intended to expand these to include a clerical, typing and stenographic pool, messenger service, mailing, office equipment maintenance, telephone service, information service and records retention and disposal.

The estimated total annual cost for equipment rental and operating salaries of all tabulating installations is close to $1,000,000. The existing Central Tabulating unit offers centralized services to all departments, but in actual practice this represents only about 12% of the total tabulating costs. About 72% of the tabulating costs are incurred in 12 other City departments, exclusive of the installation at the Board of Education which incurs about 16% of the costs.

It is proposed that the separate tabulating installations in these various departments, excepting the Police Department and the Board of Education, be consolidated in a Central Data Processing Division to be administered by a Data Processing Manager. It is intended that a complete detailed analysis be made of the work performed at the various separate locations in order to determine the minimum equipment and staffing requirements to insure maximum economical utilization on a two-shift basis. The Data Processing Manager will be personally responsible for installing a record of employee daily time and equipment usage and to develop detailed procedures and scheduling of all jobs on the basis of a continuing analysis of the work requirements by the different using departments to maintain highest usage of the equipment and personnel.

Estimated Savings

Estimates were made of the numerous recommendations in the several sections of the report in terms of recurring annual and one-time savings. Obviously these would consist of reductions of direct and indirect costs of operating, maintenance and repair activities in each of the areas covered, as well as in some of the related and auxiliary services. Because of the limited statistics available in the various fields, the making of detailed evaluations is difficult. However, the following ranges of estimated savings are presented as a reasonable expectation resulting from implementing the recommendations.

ESTIMATED SAVINGS

A. No Charter Revision Necessary

1. Recurring Annual Savings

a. Bureau of Equipment and Supplies — $ 20,000 - $ [illegible]
Staff reductions resulting from storeroom reorganizations and more efficient handling of stores operations, procedures, and records keeping.

2. One-time Savings

a. Sale of High Pressure Pipe Yard — $120,000 - $130,000
Disposal of Fire Department high pressure pipe storage yard, to be made unnecessary by transferring pipe and fittings to Water Department Pipe Yard. (Additional revenues would be derived from taxes on this property and any future improvements.)

b. Recovery from Obsolete Stocks — $ 30,000 - $100,000
Income derived from sale of obsolete unneeded materials, supplies and equipment items and junk as a result of a detailed salvage survey.

c. Reduction of Current Stock Replenishments — $150,000 - $200,000
Reduction of current expenditures to replenish stocks at various storerooms in order to gradually reduce quantities on hand to a reasonable basis.

TOTAL ESTIMATED ANNUAL SAVINGS — $300,000 - $450,000

B. Charter Revision Necessary

a. Bureau of Buying, Personnel & Accounting — $300,000 - $400,000
Staff reductions due to improved methods, and procedures; more efficient buying practices; elimination of unnecessary clerical details from purchaser's duties.

b. Central Mechanical Equipment Department — $[illegible]

Staff reductions; elimination of contractual services in automobile shop, truck shop, servicing police cars and servicing and repairing motorcycles.

Operation of Car Pool, resulting in decrease in number of passenger cars together with savings in purchase, maintenance, insurance and operating costs.

Elimination of unnecessary chauffeur positions.

c. Central Data Processing Department — $150,000 - $[illegible]

Consolidation and centralization of tabulating equipment and operating personnel; fuller equipment utilization; better scheduling of jobs and adoption of regular two-shift operation.

(No estimate possible on savings from electronic data processing equipment yet to be installed - savings should be substantial.)

d. Central Services Department — $225,000 - $[illegible]

Expansion of existing services; transfer of services from other departments, addition of new services; consolidation and centralization of all these in one organization, resulting in principal savings through the operation of a clerical, stenographic and typing pool, central mailing service, offset printing and duplicating, and records retention and disposal.

TOTAL ESTIMATED ANNUAL SAVINGS — $365,000-$1,050,000

GRAND TOTAL — $1,1[illegible],000-$[illegible],510,000

- I -

ORGANIZATION AND ADMINISTRATION

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I. ORGANIZATION AND ADMINISTRATION

Findings

The Purchasing Department organization and activities as originally established by Charter Section 61 comprised a Bureau of Supplies (today divided into the Bureau of Buying and the Bureau of Personnel and Accounts), Central Stores and Warehouses (today called the Bureau of Equipment and Supplies), and Central Garage and Shops (today called the Bureau of Shops). Subsequently, a Tabulating and Reproductive Bureau was created to fill a growing need for such services on a centralized basis.

The Purchasing Departments and its five Bureaus have a staff of 201 persons and supervised purchasing activities involving the expenditure of $17,000,000 during the fiscal year 1959-60.

1. The importance and magnitude of San Francisco City and County purchasing and storing activities and responsibilities warrant consideration of being organized as a separate department under a professionally trained and experienced Purchasing Agent reporting to a chief executive.

2. The importance and magnitude of operating the central garage and shops is likewise a distinct and separate function requiring specialized technical and mechanical knowledge, ability and experience of sufficient importance and responsibility to warrant establishment of a separate motorized equipment organization to cover all automotive vehicles and other motorized equipment.

3. The importance and magnitude of mechanical tabulating operations throughout the City and County organization warrants establishment of a separate department under a chief executive.

   The existence of individual mechanical tabulating equipment installations in 13 different departments at various locations (exclusive of the Board of Education), involving over 130 units for which the annual rental amounts to approximately $270,000 warrants consideration for establishing a separate centralized data processing center for reduction of equipment units to a minimum and for scheduling its maximum utilization to serve the needs of all departments, so far as such centralized usage can be adapted to their specific needs.

4. Central services, other than data processing, could be expanded and improved, as a separate organization reporting to a chief executive, to provide for city-wide: (1) inter-department messenger service; (2) central mailing (as far as possible); (3) central reproduction and duplicating; (4) central typing, etc.

5. As previously pointed out, the present purchasing organization does not conform to good functional arrangement, either in public jurisdiction or in private enterprise. The wide diversity of functions and activities now performed by the purchasing department is indicated on Exhibit I

Recommendations

* 1. The purchasing and storing activities be organized and established as a separate functional subdivision of a central Finance Department and administered by a professionally trained and experienced purchasing agent reporting to the Department Head.

* 2. The present central garage and shops be reorganized as a separate Motorized Equipment Department and administered by a highly trained and experienced Motorized Equipment Manager reporting to the Mayor.

* 3. The scope of the reorganized Motorized Equipment Department be increased and expanded to include responsibility for the "ownership" maintenance and repair of all automobiles, trucks and other motorized equipment used by all City departments (exclusive of buses and trolley coaches).

* 4. A centralized Automobile Pool be established under the Motorized Equipment Department.

* 5. Working capital funds be established for the Motorized Equipment Department, sufficient to defray initial operating costs over a 3-month period, such funds to be reimbursed by charges made to the various departments for equipment usage and gasoline. Appropriations covering charges to departments to be appropriated in the respective departmental budgets.

* 6. An appropriate accounting system be designed and installed for the Motorized Equipment Department in order to provide accurate information and develop necessary operating cost data for: (1) billing of departments for gasoline, etc. (2) establishing operating cost data per vehicle and fleet to be used for comparisons and as a guide for replacements

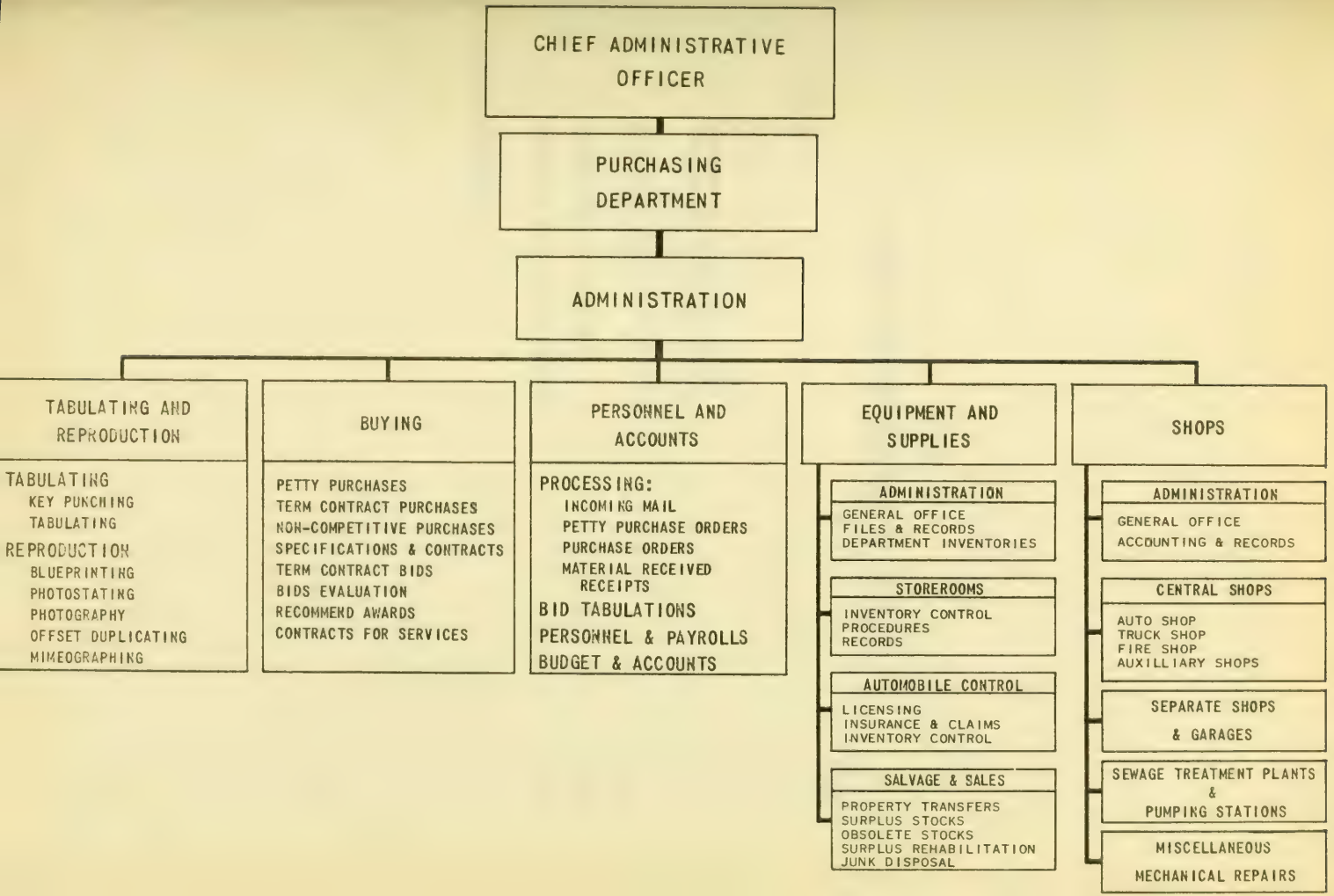
* Charter change may be necessary.

* 7. The present separate functions and installations of mechanical tabulating equipment be consolidated and centralized to the fullest extent as a separate Central Data Processing Division to be administered by an expertly trained and experienced Data Processing Manager reporting to the head of the Finance Department. The installation and use of Electronic Data Processing Equipment be effectuated as rapidly as possible.

* 8. The present central services facilities be completely reorganized and expanded in scope and kinds of services rendered in order to accommodate the needs of all City departments, under a trained and experienced Central Services Manager reporting to the Mayor, to provide such services as: (1) inter-departmental and inter-building messenger service, (2) reproduction and printing, (3) central mailing, (4) typing, stenographic, and clerical pool, etc.

* 9 The Central Purchasing Division be reorganized to consist of three subdivisions: Bureau of Purchasing, Bureau of Stores and Supplies, and Office and Clerical Section.

* Charter change may be necessary.


CHIEF ADMINISTRATIVE OFFICER
PURCHASING DEPARTMENT
ADMINISTRATION
TABULATING AND REPRODUCTION
TABULATING
KEY PUNCHING
TABULATING
REPRODUCTION
BLUEPRINTING
PHOTOSTATING
PHOTOGRAPHY
OFFSET DUPLICATING
MIMEOGRAPHING
BUYING
PETTY PURCHASES
TERM CONTRACT PURCHASES
NON-COMPETITIVE PURCHASES
SPECIFICATIONS & CONTRACTS
TERM CONTRACT BIDS
BIDS EVALUATION
RECOMMEND AWARDS
CONTRACTS FOR SERVICES
PERSONNEL AND ACCOUNTS
PROCESSING:
INCOMING MAIL
PETTY PURCHASE ORDERS
PURCHASE ORDERS
MATERIAL RECEIVED RECEIPTS
BID TABULATIONS
PERSONNEL & PAYROLLS
BUDGET & ACCOUNTS
EQUIPMENT AND SUPPLIES
ADMINISTRATION
GENERAL OFFICE
FILES & RECORDS
DEPARTMENT INVENTORIES
STOREROOMS
INVENTORY CONTROL
PROCEDURES
RECORDS
AUTOMOBILE CONTROL
LICENSING
INSURANCE & CLAIMS
INVENTORY CONTROL
SALVAGE & SALES
PROPERTY TRANSFERS
SURPLUS STOCKS
OBSOLETE STOCKS
SURPLUS REHABILITATION
JUNK DISPOSAL
SHOPS
ADMINISTRATION
GENERAL OFFICE
ACCOUNTING & RECORDS
CENTRAL SHOPS
AUTO SHOP
TRUCK SHOP
FIRE SHOP
AUXILLIARY SHOPS
SEPARATE SHOPS & GARAGES
SEWAGE TREATMENT PLANTS & PUMPING STATIONS
MISCELLANEOUS MECHANICAL REPAIRS

- II -

BUREAUS OF BUYING, PERSONNEL AND ACCOUNTS

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II. BUREAU OF BUYING, PROCUREMENT AND LOGISTICS

Findings

Buying Activities

Buying activities do not appear to be properly organized or administered for greatest efficiency or the rendering of prompt services to the using departments, agencies and offices.

1. Purchasers are presently devoting a considerable portion of their time to routine and trivial purchasing procedures normally performed by clerical personnel.

2. There is a lag of 8 to 10 days in processing a Requisition for Purchase Order from the requesting department to the Buying Bureau office, largely due to lack of formalized, planned and scheduled messenger service and delay in approving and encumbering the request document at the source.

3. Sorting and distribution of Requisitions in the Buying Bureau do not receive sufficient attention as to separating those applying to blanket contracts in force from those requiring new purchases.

   Sorting and routing Requisitions against blanket contracts already in force to clerk-typist personnel would immediately relieve the specialized Purchasers for important buying and related duties.

4. Requisitions for items involving small amounts should not be processed by the Buying Bureau. Such purchases should be made directly by the requisitioning department from the vendors.

5. The tabulations listed below recapitulate the purchase orders for the calendar year ended December 31, 1960. It should be noted that:

   a. Purchases of $25 or less required 10,007 separate Purchase Orders totaling $156,020 or an average of $15.59 per order. Thus 23% of the total Purchase Orders issued were required to purchase 0.9% of the total value of all purchases.

c. Purchases of $100 or less required 26,769 separate Purchase Orders totaling $1,122,570. Thus 61.5% of the total Purchase Orders issued were required to purchase 6.7% of the total value of all purchases.

5. a. Percentage of Total Value of Purchases By Value Groupings

Value Classification	Total Value	% of Value of Total Purchases	Accumulated % of Total
Under $25*	$ 156,020	0.9	0.9
25 - 50	336,100	2.0	2.9
50 - 75	282,000	1.7	4.6
75 - 100	348,450	2.1	6.7
under $100	1,122,570	6.7	6.7
100 - 500	2,796,300	16.5	23.2
500 - 1000	1,621,400	9.6	32.8
1000 - over	11,412,500	67.2	100.0
Total	$ 16,952,770	100.0	---

b. Number of Purchase Orders Issued By Value Groupings

Value of Each	Number Issued	% of Total	Accumulated % of Total
Under $25*	10,007	23.0	23.0
25 - 50	8,562	19.7	42.7
50 - 75	4,409	10.1	52.8
75 - 100	3,791	8.7	61.5
Under $100	26,769	61.5	61.5
100 - 500	11,992	27.6	89.1
500 - 1000	2,258	5.2	94.3
1000 - over	2,477	5.7	100.0
Total	43,496	100.0	---

* Details of selected purchases tabulated for the purchasing agent included many purchase orders for amounts of less than two dollars.

6. Further reduction of the remaining purchase requisitions could be made by insisting that the requesting department first check its local storeroom and the Central Warehouse catalog in order to exhaust the possibilities for storer issuances of some or all of the requested items or acceptable substitution of other similar items.

7. Study of requisitions for new purchases could be continuously made to determine if it was could be prevented under blanket contracts by modifying existing contracts or establishing new agreements.

8. Consideration of all the above elements would materially reduce the number of Requisitions handled and remove the existing backlog of these documents, which in a number of instances were found to date from one week to one and one-half months after the time received in the Buying Bureau.

In other less frequent cases, dealing principally with equipment, machinery, etc., the delay was observed to be from two to six months. These delays are reported to be caused by budgetary restrictions on equipment buying.

9. It should be the principal concern of the Purchasing Agent and the Buying Bureau to concentrate on the more important aspects of the buying activities.

10. Initiating, handling and processing Requisitions for individual or departmental telephone services each month together with the subsequent preparation of Purchase Orders and related invoicing on an individual departmental basis could be eliminated.

The similar processing of other utility services, such as water, gas, and electric, each month, is unnecessary and could be eliminated. It was stated that efforts to improve this situation were under way.

11. In general, the present Purchasers complain that fully half of the Requisitions received from using departments are not well prepared, having either too little or too much information and often incorrect descriptions, specifications, quantities, prices, etc.

12. According to Purchasers, Requisitions for the same commodities must be kept separate by appropriations in the various departments, rather than being consolidated into a single transaction and the invoiced amount later distributed to the users by coding.

13. In general the appearance, arrangement and overall work practices and "housekeeping" in the Purchasing Bureau were observed to be somewhat unsatisfactory and disorganized, possibly due to lack of space and filing facilities for records, catalogs, etc.

14. Wider consideration could be given to the solicitation of bids and the maintenance of lists of vendors (competitive bidders), especially out-of-town sources.

It was observed that in certain cases purchases were being made through brokers rather than direct from manufacturers.

Processing Requisitions and Preparing Purchase Orders

1. The sorting of Requisitions into 4 major departmental categories and accumulating them in batches of 40 each for transmittal to typists to prepare the Purchase Orders tends to contribute to delaying the purchasing process.

2. The proofreading by one employee of Purchase Orders typed by 4 typists, is unrealistic considering that the average number to be proofed is about 20 per hour. Consequently the proofing must usually be reduced to mere scanning of a backlog of unproofed requisitions sometimes permitted to accumulate.

3. The transmittal of all Purchase Orders to the Controller for pre-encumbering departmental appropriations and the approval of their issuance would not be necessary if the encumbering authority were delegated to the department level, under Controller audit.

In fact, Petty Purchase Orders (normally less than $100) are not processed in the above manner but are encumbered in the Purchasing Department against departmental revolving funds within semi-monthly limitations, suggesting the establishment of a similar departmental responsibility for encumbering all Requisitions at the departmental level as an inherent responsibility of the department head.

4. The processing of procurement documents could more properly be divided as follows:

a. Requisitioning at the department level.

b. Pre-encumbering of appropriations at the departmental level, under rules prescribed by the Controller and subject to his periodic audit.

c. Authorization of Purchase Orders by the Purchasing Agent alone.

d. Checking of invoices by the Purchasing Agent.

e. Authorizing of payment of invoices by Controller.

f. Accounting for expenditures by Controller.

5. A combined purchasing activity involving some [illegible] purchase Orders per year amounting to a total of about $17,000,000 entails the problem of efficient expediting to assure prompt processing of all documents and subsequent deliveries. This is presently the responsibility of the individual Purchasers. However, the proper expediting of the purchasing procedure might better be performed by one employee functioning as an expeditor.

6. The necessity for maintaining current files of Purchase Orders for 3 years, plus 4 years additional in the central records storage, is not apparent. The time period might be shortened to permit reduction of these voluminous records, at least in the current files if not in the central records storage.

Processing Bids, Tabulations and Contracts

1. In observing the processing in this Bureau of Informal Quotations (for purchases of $1,000 or less of non-proprietary articles or services) it was noted that the proposal forms are usually sent to a minimum of 3 vendors. A copy of the informal quotation is also made available at the public counter for inspection by any vendor.

2. Certified checks which accompany the bids, often accumulating to a considerable number, are held in a regular letter file, rather than in a more protective and safe repository such as a vault or safe.

3. Separate service contracts, such as for office equipment maintenance and others, covering an annual period, are made by the various departments and agencies. Separate monthly Requisitions for each contract require separate processing. With such formal service agreements in effect, it would appear possible to merely require the department's signature on the company's "service call tickets," forwarded to the Purchasing Department (without formal Requisition) for auditing a consolidated invoice for the period covered and transmittal to the Controller for payment. The costs could be coded and distributed to the accounts of the department concerned. It was reported that attempts were being made to simplify this procedure.

Because these annual service agreements appear to vary considerably, based on departments' individual needs or requests, there seems to be a need to review the entire equipment servicing program in order to achieve greater uniformity and consolidation.

4. The maintenance of separate "revolving fund" accounts by the Purchasing Department for most of the departments, together with all the related detailed procedures now required, would be unnecessary if the responsibility for making petty purchases were delegated to the respective department heads, under a local purchase order procedure. Under this procedure the properly signed receiving copies, together with the corresponding vendor invoices, could be reviewed and approved by the Purchasing Department and transmitted to the Controller for payment.

Timekeeping and Payrolls

Present practice varies from daily non-uniform time slips on an individual or group basis, which may or may not be signed by a supervisor, to checking Purchasing Department office personnel attendance by the clerk.

Present timekeeping and reporting does not conform to good positive timekeeping practices.

1. Daily approval of each individual employee's time by his immediate supervisor and the preparation of a weekly consolidated time report, approved and signed by such supervisor, would be prima facia evidence of actual time worked and form the basis for semi-monthly time roll preparation.

2. Employees are not required to personally sign the roll upon receiving their semi-monthly pay checks. This useless and obsolete practice could be discontinued and the corresponding work interruption and loss of time avoided.

3. With proper timekeeping forms and procedures, the posting and preparation of the semi-monthly time rolls and related personnel procedures for about 115 employees would not require the exclusive attention of one clerk.

Budgetary Control Accounting

It is generally desirable to maintain budgetary accounting and control records at the departmental level as a management control tool but the systems and procedures should be uniformly established and audited by the Controller and periodically reconciled with the central fiscal records in the Finance Department.

1. While such departmental budgetary control records are kept in the Purchasing Department they are not closed at regular monthly intervals and consequently are not always currently reconciled with the Controller's statements.

2. The principal benefits should be derived from properly and accurately maintained departmental budgetary control and accounting records:

   a. They should signal and guard against overencumbrances in all budgetary appropriation accounts, preferably on a monthly basis either against monthly, quarterly or annual allotments of funds.

   b. Monthly "budgetary status" statements should show, both in terms of amounts and percent, the extent to which each account has conformed with or deviated from the established appropriations, together with an explanation of all substantial deviations, for the month, quarter and fiscal year to date.

3. Under existing circumstances, it is probable that the full time of an accounting employee is not now required.

   It may be possible to consolidate the personnel, payroll and budgetary accounting duties above discussed as the exclusive responsibility of one employee.

Recommendations

Buying Activities

1. All unnecessary routine clerical work be eliminated from the duties of the Purchasers and thereafter their work be confined to actual purchasing procedures.

2. The processing of Requisitions for Purchase Order forms be expedited through full use of the recommended messenger services.

3. Assigning Requisitions to Purchasers for routine commodities already covered by currently active blanket contracts be discontinued and, instead, these be routed to assistants for routine processing, thus relieving the Purchasers for more important work. This reportedly was the previous practice but could not be continued because of staffing difficulties.

* 4. Requisitions for trivial and low-cost items costing less than $100 be discontinued and the initiating department be granted authority to make such purchases locally by use of a standard pre-numbered "Local Purchase Order" form and a procedure established therefor.

* Charter change may be necessary.

5. All requests for purchases be processed by the initiating department as follows:

a. The availability of items in local storeroom should be checked first, as a rigidly enforced procedure.

b. The availability at the Central Warehouse be checked by consulting the warehouse catalog.

c. If not stocked by the Central Warehouse, then the Buyers Guide be consulted to determine if items are covered by blanket purchase agreements, in order to reduce new purchases to a minimum.

* d. Purchases up to $25 in value may be made from departmental revolving funds, without processing a requisition through the Central Purchasing Division.

* e. Petty purchases of items amounting to less than $100 be made directly by departments, using a pre-numbered Petty Purchase Order.

* f. Requisitions for purchases in excess of $100 be submitted to the Central Purchasing Division.

6. Requisitions for purchases be processed by the Central Purchasing Division as follows:

* a. Purchases of $100 to $500 be made through soliciting quotations by telephone or by the "informal quotations" procedure currently in use.

(Greater solicitation of telephone quotations be made, properly recorded and test audited at regular intervals, in order to decrease the time required to make these types of purchases.)

* b. Purchases of $500 to $2500 be made through solicitation of written "Informal Quotations" in conformance with established procedure.

* c. Purchases in excess of $2500 be made by formal sealed bids in accordance with legal requirements and established procedures as is done in many California cities.

d. All the foregoing purchasing categories be subject to audit.

* Charter change may be necessary.

7. Requisitions for any purchase be subjected to continual scrutiny to determine if the type of commodity could be stocked to better advantage or procured under blanket purchase agreements.

8. Processing Requisitions be expedited to the greatest extent possible in order to reduce the time interval during which these documents are now, at times, permitted to accumulate awaiting action.

9. With the elimination of all unnecessary routine clerical work and small purchases, maximum use be made of the Purchaser for the more important aspects of purchasing, including: (1) standards and specifications, (2) negotiations with prospective vendors, (3) securing increased competition, (4) conferring and cooperating with requesting departments on importers, specialized and technical matters, (5) studying market conditions and determining most favorable buying times, (6) searching for better and cheaper sources of supply of satisfactory substitute items at more favorable prices, and (7) determining the fullest extent to which needs can be pooled, and bulk buying resorted to on the most economical basis.

* 10. The present practice of initiating, handling and processing individual monthly departmental Requisitions and Purchase Orders for telephone services and other utilities already covered by regular continuing agreements be discontinued and preferably consolidated invoices be processed direct for payment.

11. Instructions be prepared and issued to all departments regarding methods and procedures for correctly and completely preparing Requisitions, and meetings conducted with the responsible personnel to assure understanding and adherence to such procedures, thus relieving the Purchaser and related clerical personnel of considerable unnecessary time and effort.

* 12. The present practice of requiring separate Requisitions to be prepared for each appropriation code be discontinued as being unrealistic and unnecessary from either a purchasing or accounting standpoint.

* Charter change may be necessary.

13. Increased emphasis be given to establishing and maintaining lists of vendors and prospective bidders and expanding such lists to the fullest extent for both local and out-of-town sources and maintaining them on a current basis.

"Informal Quotations" and telephone quotations be requested by selecting minimum groups of 2 vendors in consecutive order until the list is exhausted, after which the procedure be repeated. These two vendors be in addition to the two low bidders on the last previous purchase of the item(s), where available, it being the intention to have a minimum of three bidders.

14. Purchasing assistants, instead of Purchasers, be utilized to obtain quotations, by mail or phone, for routine purchases and for ordinary information in order to conserve the Purchaser's time for more important matters, as elsewhere recommended.

Processing of Procurement Documents

1. The practice of pasting a copy of the newspaper advertisement of formal bids on copies of the forms mailed to prospective bidders be discontinued as being unnecessary.

* 2. The practice of preparing Requisitions and Purchase Orders for periodic servicing of various types of office equipment used by departments throughout the City, for which annual service agreements are in effect, be discontinued, the signature of the department receiving the service, on the signed "service call" tickets being considered sufficient for approval and payment of the corresponding invoices.

The possibility of establishing an office equipment repair service be studied as a means of improving this activity at reduced costs.

3. The period over which central Purchase Order files are now kept current, be reduced to conserve space and filing equipment.

4. A Standards-Expeditor position be created to encompass the following duties:

a. Standards - Establish standard specifications for commonly purchased items in cooperation with department heads, manufacturers, etc.

b. Expediting - Systematic follow-up of all steps of the procurement procedures for important purchase orders.

* Charter change may be necessary.

Personnel and Payroll

1. The present practice of requiring the Personnel and Payroll Clerk to post daily time of individual employees from several different types of daily time reports received from various locations be discontinued. A consolidated weekly time report, approved and signed by the respective supervisor, be devised as a basis for preparation of the semi-monthly payrolls.

2. The requirement that employees "sign the payroll" upon receiving their semi-monthly salary checks be discontinued.

3. The duties of the present Payroll and Personnel Clerk be combined with those of the Accountant, and the former position eliminated.

Budgetary Control Accounting

1. The procedure of maintaining Purchasing Department budget appropriation control through pre-encumbrance of accounts be continued and reconciled with the Controller's reports.

2. Monthly budget status statements be prepared for the information of the Purchaser of Supplies and others concerned, indicating the unencumbered balances in each appropriation, comparisons with standards for the period and year to date, and explanations of important variables. These matters be made the regular responsibility of the accountant.

* 3. The encumbering of all Purchase Orders and the final authorization for their issuance in the Controller's Department be eliminated in view of the fact that budget appropriation encumbrance records are being maintained at the department level in a more current status. Such departmental records be subject to regular periodic audit and reconciliation with the Controller's basic fiscal and accounting controls.

* 4. Concurrently with the foregoing, the practice of having the Purchasing Department maintain a series of departmental "revolving funds" for encumbering "Petty Purchase Orders" within semi-monthly limitations be discontinued, and full responsibility for encumbering purchases be placed with the initiating department head as a normal administrative requirement.

* Charter change may be necessary.

General

* 1. On the basis of the previous recommendations, the requisitioning, purchasing and accounting responsibilities and procedures be divided as follows:

a. Requisitioning at the departmental level.

b. Pre-encumbering of appropriation accounts at the departmental level, subject to audit by Controller.

c. Purchases be made by Departments and the Purchasing Department in accordance with procedures outlined in paragraphs 5 and 6 of the Recommendations on Buying Activities.

d. Checking of vendor invoices by Purchasing Department.

e. Audit and payment of invoices by Controller.

f. Accounting and control of expenditures by Controller.

g. Monthly reconciliation by departments of their encumbrance records with statements prepared by the Controller.

* Charter amendment may be necessary.

BUREAU OF EQUIPMENT AND SUPPLIES

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III. BUREAU OF EQUIPMENT AND SUPPLIES

Findings

General

This organizational subdivision of the Purchasing Department involves the administration of 21 storerooms in as many locations throughout and adjacent to the city and at Hetch Hetchy (Moccasin). In general, the arrangement may be classified as a "decentralized system" where the control, though apparently intended to be "centralized" in the Purchasing Department, is actually "fractionized" among many different using agencies. From an operating standpoint this makes the actual responsibility departmental.

1. This centralized "functional" stores administration by the Purchaser of Supplies and the decentralized "departmental" stores operation at many scattered locations has made and continues to make it difficult to obtain the efficient and economical storekeeping methods and results necessary to the following phases of good storekeeping:

   a. Physical aspects of storing and handling commodities, materials and supplies and,

   b. Control, replenishment, issuance and accountability for items and quantities stored.

2. In general, from observations made at all of the locations, with a few exceptions, it must be concluded that when measured against normally recognized good storekeeping practices, a great deal of improvement is necessary in both the above-mentioned phases before good storekeeping and control are achieved.

Physical Aspects of Storing

The location, space requirements, design, construction and layout of so many specific stores facilities to serve the needs of so large and far-flung an organization as the City and County would normally require professional consideration of each storing facility in order to adapt it to the specific requirements as to what, where, how and how much is to be stored.

It is reported that management has recommended improvements in physical facilities; however, these recommendations have not yet been implemented.

1. There is little evidence that such pre-planning has been applied consistently to the stores system; notable exceptions being at several of the Municipal Railway locations, and to a lesser extent at others.

2. Some where new facilities have been only recently constructed, emphasis has been placed on the structure rather than on the ability or suitability of the space to accommodate the present and future storing needs.

3. Under the circumstances, at both old and new storerooms, the problem is how best to utilize the spaces available. This has been achieved with varying degrees of success from very poor to very good, as summarized below:

a. Buildings where storerooms located. From dilapidated, overage wooden structures to new reinforced concrete brick and steel buildings.

b. Storeroom layout. Unsatisfactory in many instances; fair to good in others.

c. Shelving, bins, racks, etc. Considerable old makeshift wooden units; poor to satisfactory wooden units at other places; some steel units, especially in Municipal Railway locations.

d. Identification and location of stored items. Well done in some instances, but in a number of cases no studied consideration has been given to this very important aspect of storing, there being no uniform or systematic approach to proper bins and shelving marking in order to identify and locate the items quickly and accurately by name, number or code designations.

e. Storing methods in use. Standardized uniform practices for stocking, piling and arranging items on shelves, in bins and on floors are not generally adhered to, producing a wide range of results from inattention to good housekeeping, depending largely on the initiative and interest of the individual storekeepers.

f. Materials handling equipment. Hand and power-operated equipment, such as flat trucks, handlift trucks, forklifts, etc., are not in common use although opportunities occur for their adaptation to handling, transporting and placing heavy and bulk-packaged items.

g. Safety and protection. In general, the protection of stocks against natural elements is good; however, leaking roofs and damp floors were noted in some locations. In a few instances, while doors and gates were equipped with locks, they were observed left open or unguarded. In other instances there appear to be more means of ingress and egress than are reasonably necessary considering the size, use and activity. In general, it appears that vandalism is not a serious problem.

h. Storage yards. There are a number of storage yards, either adjacent to storerooms or at separate locations. In general, they are enclosed with high chain-link fences topped with strands of barbed wire. In some instances, however, the yard areas are not fenced or are only partially enclosed. Arrangement of stored materials is poor in some instances.

i. Storage of inflammables. Provisions for storing bulk oils, gasoline in containers, and other hazardous items could be given greater attention in several instances in order to comply with reasonable safety requirements.

Control, Replenishment, Issuance and Accountability

With the above general evaluation of the physical storing facilities, good stock control, inventorying, record keeping and overall stores accountability cannot be achieved under existing circumstances.

1. There is a lack of consideration of basic location and identification of items carried in stock at some stores locations. To the extent that they do exist, the procedures are not consistent and uniform in all storerooms.

2. The extent to which such basic records are absent or incomplete reflects directly and proportionately on all subsequent storeroom operations and inventory control measures. Quantities on hand cannot be accurately reported, thus accurate inventory control becomes extremely difficult.

3. Stores issuance forms and procedures are not uniform.

4. In many instances where inventory record systems have been installed, they are not maintained up-to-date to reflect current balances on hand. Such delayed postings were observed to be from a few days to six months in arrears. In other instances, where inventory records were current, lack of issuance activity (turnover) indicated the possibility of eliminating some items

In other cases the rate of instance has been so slow that from six months' to several years' supply was being carried on hand. Such occurrences point to the opportunity for marked reduction of balances on hand so that money invested in unnecessary inventories could be reduced to a minimum.

5. Minimum quantity standards for balances "on hand" and re-order quantities are generally not shown on the inventory control cards now in use, when requisitioning stock replenishments.

6. The policy or practice for re-ordering is not clearly defined, but appears to rest primarily on the opinion and judgment of the storekeeper, and in a number of instances is based on three to nine months' periods due to the time interval experienced in processing the regular requisitioning and purchasing documents. This seems to be a general complaint at several departmental locations.

7. There appears to be a lack of anticipating needs and scheduling requests for similar commonly used items to assist purchasers by reducing the number of separate transactions.

8. The frequency with which commonly used items were observed to be carried in local stores points to a lack of consideration being given to the accepted principle of combining all such needs for advantageous bulk purchasing and central storing. Some of this has been done, but much more needs to be done.

9. No complete catalog of all commodities stored at the Central Warehouse exists. A stationary catalog was issued in December, 1960.

10. All requisitions are not checked for availability of the requested items or satisfactory substitutes in the departmental storeroom or Central Warehouse in order to avoid unnecessary purchases.

11. The existing situation appears to warrant a thorough study of all items on hand at all locations to establish:

    a. Their need
    b. Minimum quantities required on hand
    c. Policy for re-ordering
    d. Commonly used items for bulk buying and central storing
    e. Reduction of the number and value of inventory items to a minimum

Personnel and Work Performance

A wide divergence in the abilities, initiative, and personal interest among the storekeeping personnel was observed. This results in a marked difference in the quality and amount of work performed. This may arise partially from a lack of direction and supervision. This observation is substantiated by:

1. Absence of statistical records and reports of workload or work performance to indicate the relative storeroom activities, flow and handling of receiving, issuing and requisitioning documents, number of items issued, number of items received, number and value of items on hand, etc. This makes it difficult to evaluate position and staffing requirements.

2. Based somewhat upon rough approximations of such data, where at least partially available, it appears that some locations are overstaffed. Similarly the comments heard at several locations on the need for additional personnel did not appear to be justified on the basis of the nature, caliber, or quantity of work being performed by present incumbents.

3. There appears to be need for closer and tighter supervision at the storekeeping level and it may be that this cannot be had under the present system of "functional" direction.

Automobile Inventory Control

This activity is concerned with:

a. Inventory of Automotive Equipment
b. Registering and Licensing of Automotive Equipment
c. Insuring Automotive Equipment

1. Examination of the forms, methods and procedures followed in maintaining the automobile inventory control indicates that this portion of equipment inventory is well kept and kept to current status, in conjunction with the I.B.M. Tabulating Bureau located in the City Hall, covering all units on hand, transfer-ins, sales and new purchases.

Other Equipment Inventory and Control

This activity includes the maintenance of inventory records of all categories of equipment, other than automotive equipment.

1. While inventories of these groups of equipment had at one time been established and maintained, the practice was discontinued about 1956-57 reportedly due to lack of sufficient field and office personnel and to policy decisions to emphasize other work.

4. It was reported that the documents covering the receipts, issues and transfer of items upon which such group inventories are based, have been preserved and filed.

5. In general, it would be necessary to process all of these actions subsequent to the last date of the consolidated I.B.M. inventory tabulations in order to bring the control records up-to-date. This in itself would not completely discharge the inventory responsibility and accountability.

4. The work could not be considered complete unless and until a reconciliation were effected between the quantities on hand at the various locations and the book records.

5. The scope and extent of such a project would require special personnel assigned to this specific task until a reconciliation is effected.

6. Such records could thereafter be maintained in current and complete status, including physical counts by each department's regular personnel at regularly scheduled intervals. These could then be reconciled with the central records and the causes of the differences determined.

Materials and Supplies Inventory Control

A somewhat similar situation as the above, exists in conjunction with the maintenance of current and reconciled inventories of materials and supplies at the various storekeeping locations with the exception of the Municipal Railway locations and a few others.

1. Management has recognized the need for bettering this situation and has assigned a highly trained and experienced storekeeping employee to assist the Supervisor of Equipment and Supplies in conducting studies and making installations in the various storerooms.

2. This employee has previously been in charge of the Municipal Railway Stores above referred to and was responsible for the installation of most of the basic forms, records and procedures in the storerooms themselves and for the maintenance of central inventory files and records by which they are controlled.

3. The consistent application of the same techniques to all storekeeping, inventorying and reporting procedures would greatly improve the existing situation, providing that all storekeeping inventory records are reconciled with the central controls at regular intervals.

4. A review of the limited statistical data that was available showing inventory value and monthly usage at various storage locations, indicated excessive, obsolete and/or slow moving inventories. This is shown by the following tabulation:

Location	Inventory Value	Monthly Issues	Months Stock on Hand
Municipal Railway:			
General Stores	$[illegible]	$18,200	18.1
Potrero Stores	88,500	4,700	18.8
24th & Utah	210,000	21,200	9.9
Water Department:			
Bryant Street and Pine Yard	444,000	59,400	7.4
Hatch Hetchy	50,000	4,000	12.5
Central Warehouse	95,000	16,600	5.7
Municipal Airport	19,300	2,000	9.7
S.F. General Hospital	220,000	38,500	5.7
Central Shops	71,600	3,550	20.2
Department of Public Works	89,600	12,250	7.3

Management explained that in many cases recommendations to dispose of obsolete stores have not always been adopted.

5. With stocks on hand sufficient to serve from 5.7 to 20.2 months normal needs, it is estimated, based on these limited statistics, that considerable savings could be effected by reducing the inventories to six or four months' usage. Part of this reduction would result from elimination of obsolete materials which should be sold or junked. A considerable portion of the reduction however would result in lower replacement requirements during the period required to adjust to lower inventories.

6. A comparison of the statistics available on the values of normal issues at various storerooms locations with the annual cost of staffing the storerooms discloses a substantial variation from a low of 3% to a high of 7%. A portion of this variation is due to the nature and relative unit costs of the items issued. It was also pointed out that the amount of requisitioning and salvage operations conducted by different storerooms varied substantially.

A comparison of the present inventory values with the annual cost of staffing the storerooms discloses a variation from 5% to 47%. Suggested reductions in inventories on hand would result in even greater variations in this relationship.

Recommendations

Physical Aspects of Storing

1. A complete analysis of the physical storekeeping facilities at each separate location be made to ascertain the need and adequacy of the facilities, including:

   a. Determining need for building replacement, rehabilitation and/or repairs.

   b. Redesigning and improving space layouts.

   c. Designing reconstructing and/or replacing bins, shelving, racks, etc., to conform with standard practices.

   d. Adopting uniform methods and procedures for the proper identification and location of all stored items to facilitate issuing, receiving and inventorying.

   e. Providing standard uniform methods, procedures and instructions for good storekeeping and enforcing compliance.

   f. Providing customary hand and power material handling tools and equipment, as necessary.

   g. Providing adequate protection against damage from the elements, theft, and vandalism as applying to both storerooms and storage yards.

   h. Providing special precautions and fire safe storage for inflammables, in accordance with applicable building, fire and safety codes.

Control, Replenishment, Issuance and Accountability

1. Satisfactory, uniform records for establishing and maintaining continuous accountability and responsibility for all items at all locations be provided in order to achieve accurate inventory control.

2. The personnel in charge of each storeroom be held strictly responsible and accountable for completeness and accuracy of the stores and inventory records, procedures and reports.

   The installed system of storekeeping and inventory records and procedures be maintained in current status at all times to permit auditing and checking of balances on hand.

3. Continuing analyses be made of the rate of turnover of various items from stock over definite periods to determine rapidity of turnover as a basis for establishing and/or correcting reasonable minimums to be carried on hand or items to be discontinued entirely.

4. Such minimum standard balances be posted on the respective inventory record cards to signal the need for replenishment of stocks in lieu of the present policy and procedure of relying in many cases on the opinion and judgment of the storekeeper.

5. Requisitioning policies, forms and procedures be made uniform throughout, including anticipating and scheduling definite dates for pooling needs for commonly used commodities to reduce "paper work."

6. Complete catalogs be prepared by separate categories of commodities stocked at the Central Warehouse and distributed to all departments, agencies, etc.

7. A manual of procedure be prepared and maintained covering all phases of storekeeping and detailed duties, responsibilities and accountability of storekeepers and auxiliary personnel.

Other Equipment Inventory Control

1. The methods and procedures in effect prior to 1956-57 for maintaining centralized inventory records of all other types of equipment listed in the inventory classification by separate codes, be re-activated and brought up-to-date and thereafter kept in current status.

2. Subsequently, at regular periodic intervals, the inventory quantities be determined by actual physical count by departmental personnel and reconciled with the respective control totals, and responsibility and accountability re-established for overages and shortages.

Materials and Supplies Inventory Control

1. The present excellent beginning which has been made to improve the entire storekeeping methods and inventorying procedures covering all materials and supplies at the separate stores locations be continued until uniform and complete systems have been established and smooth and accurate operations are achieved.

This favorable program be intensified by requiring existing storekeeping personnel at the various storerooms to proceed with the necessary changes and improvements under adequate and close supervision.

2. Stocks at the Central Warehouse be expanded and this facility used as a major depot for centralized stocks of commonly used items which can economically be purchased, stored and distributed from a central warehouse. Stocks of similar items at various separate locations be discontinued or reduced to the minimum.

3. Concurrently with the improvement of storekeeping methods and procedures, all surplus and obsolete materials, supplies and equipment be discovered, identified and eliminated from the stocks carried on hand.

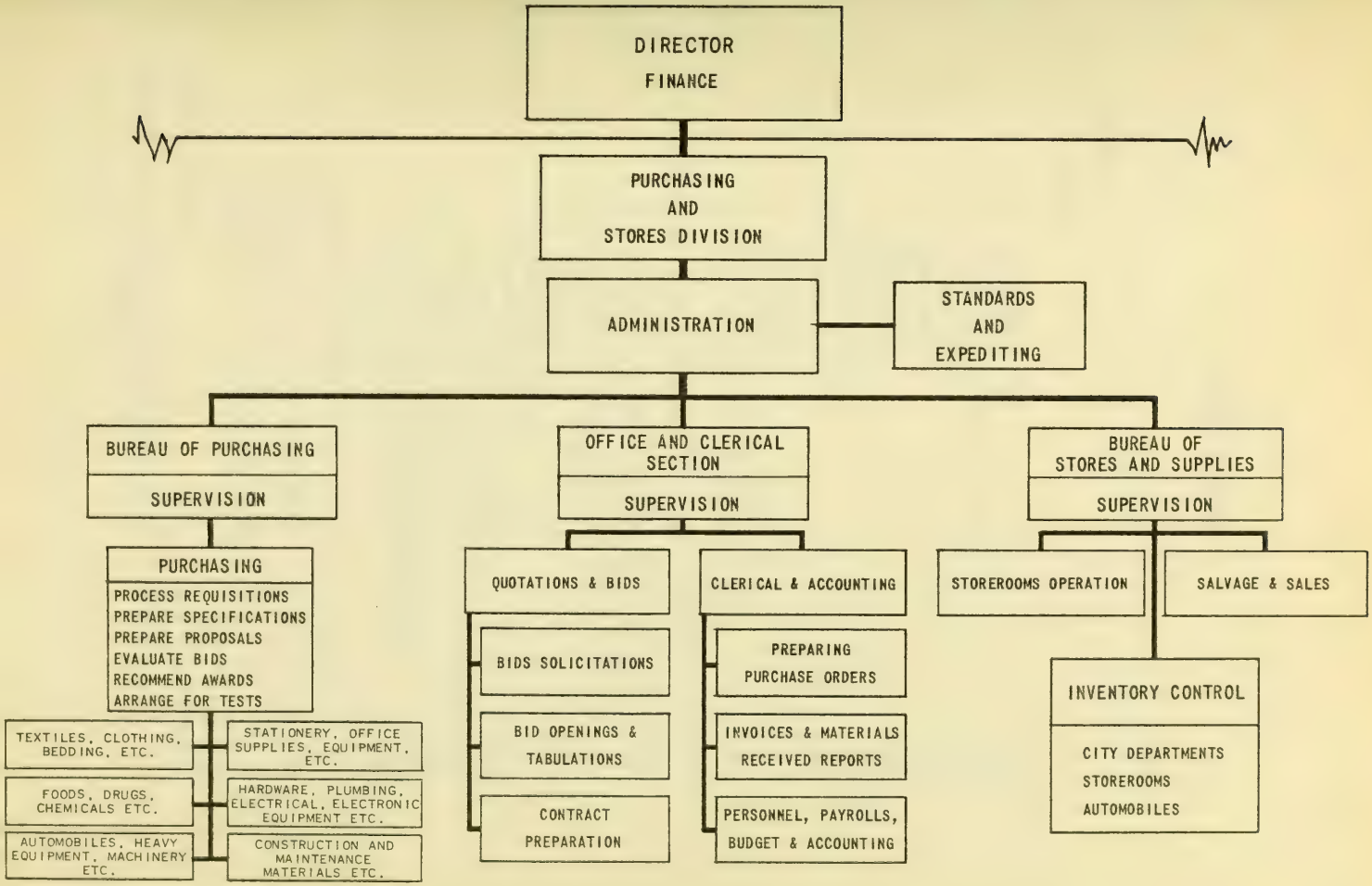
4. In view of the relatively high cost of staffing some minor storerooms, an analysis be made to determine the feasibility of discontinuing the operation of such storeroom operations, and furnishing the requirements by weekly requisition from the Central Stores location or by direct delivery, as required.

General

1. The materials stored at the Fire Department high pressure pipe yard be transferred to the Water Department pipe yard and the vacated property sold.

Proposed Organization

1. The purchasing functions and activities be reorganized substantially as indicated on Exhibit II.


DIRECTOR
FINANCE
PURCHASING
AND
STORES DIVISION
ADMINISTRATION
STANDARDS
AND
EXPEDITING
BUREAU OF PURCHASING
SUPERVISION
PURCHASING
PROCESS REQUISITIONS
PREPARE SPECIFICATIONS
PREPARE PROPOSALS
EVALUATE BIDS
RECOMMEND AWARDS
ARRANGE FOR TESTS
TEXTILES, CLOTHING, BEDDING, ETC.
FOODS, DRUGS, CHEMICALS ETC.
AUTOMOBILES, HEAVY EQUIPMENT, MACHINERY ETC.
STATIONERY, OFFICE SUPPLIES, EQUIPMENT, ETC.
HARDWARE, PLUMBING, ELECTRICAL, ELECTRONIC EQUIPMENT ETC.
CONSTRUCTION AND MAINTENANCE MATERIALS ETC.
OFFICE AND CLERICAL SECTION
SUPERVISION
QUOTATIONS & BIDS
BIDS SOLICITATIONS
BID OPENINGS & TABULATIONS
CONTRACT PREPARATION
CLERICAL & ACCOUNTING
PREPARING PURCHASE ORDERS
INVOICES & MATERIALS RECEIVED REPORTS
PERSONNEL, PAYROLLS, BUDGET & ACCOUNTING
BUREAU OF STORES AND SUPPLIES
SUPERVISION
STOREROOMS OPERATION
SALVAGE & SALES
INVENTORY CONTROL
CITY DEPARTMENTS
STOREROOMS
AUTOMOBILES

BUREAU OF SHOPS

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IV. BUREAU OF SHOPS

Findings

General

This subdivision of the Purchasing Department is responsible for the servicing, maintenance and repair of about 1,300 motor vehicle units assigned to 34 departments of the City-County administration, the work being principally carried on at the Central Shops in the southeastern section of the city.

The Central Shops consist of a number of specialty units: (1) Automobile Shop; (2) Truck Shop; (3) Fire Engine Shop, together with several auxiliary shops such as Machine Shop, Blacksmith Shop, Ladder Shop, Paint Shop, Upholstery Shop, Body and Fender Shop, Tire Shop, Hose Shop, and Service Station.

The buildings and facilities are new, having been designed and constructed by previous management with the intent and purpose of consolidating several shops previously at separate locations.

1. Although designed as central shops, there are a number of other locations throughout the city where similar maintenance, repair and/or servicing operations are being performed: Park Shops, Hall of Justice Garage, Public Works Department Army Street Yard, Public Works Department 19th Avenue Garage, Health Department Garage, Department of Electricity Garage, Police Motorcycle Garage, and the 15th and Harrison Street Service Station.

   In addition, maintenance, repair and servicing operations are performed by the Municipal Railway at its 24th and Utah shop and by the Water Department at its Bryant Street Yard.

2. Thus, while the Purchasing Department has the responsibility for centralized control and administration of the repair and maintenance of most departmental automotive vehicles, the scope of the activities still remains widely scattered and the span of supervision correspondingly thin.

3. As a consequence, this over-all functional supervision over so many locations and different types of organizations, results in considerable supervision on a separate departmental basis, presenting opportunities for jurisdictional differences in the exercise of supervisorial authority and/or lack of exercise of authority to the extent necessary to achieve good procedure, performance and results.

4. The obvious conclusion, based on the above observations, is to question the effectiveness of this type of organization and the need for maintaining so many service and repair locations.

Consequently, elimination or consolidation of some of these may be feasible, especially on completion of the new Hall of Justice service station.

A. Automobile Shop

Approximately 425 passenger cars and light pick-up type vehicles are repaired in this shop which is staffed by 1 Sub-Foreman Machinist, 7 Auto Machinists and 2 Garagemen.

The procedure followed is for the Foreman to inspect the car coming in for repair, make out a work order and assign the job to an Auto Machinist.

A system of "loaners" is being developed for issuing a car for use while the repairs are being made. At present, there are only 5 units in this loaner fleet.

1. On the basis of an approximate breakdown of one month's work, about 17 jobs are processed each working day, or 2.4 per mechanic per day. Some of these are "sent out" to commercial garages, it being the practice to have major overhaul done by annual contractual agreement.

2. Specialization of types of work among the mechanics is not resorted to, there being maximum flexibility in their assignment and rotation.

3. No distinction is made as to the type of work done in this shop, as for example, between "preventive maintenance" and "repair." There is no established preventive maintenance program for periodically servicing all units.

4. The two Garagemen spend considerable time in making pickups of materials, parts and accessories from vendors as they are needed by the mechanics working on the different types of cars; it being impractical to stock a sufficient variety of parts for the various makes, due, in large part, to the lack of standardization of makes, types, body styles, etc. There are approximately 90 different passenger make, model and year combinations in use.

5. Only about one-half of the available space in this shop is being utilized as working area, the other half being used for storage of vehicles awaiting repairs, indicating a lack of maximum utilization for actual shop purposes.

6. This lack of maximum shop utilization indicates the possibility of consolidating some of the other service and repair activities at other locations previously mentioned, thus reducing overhead expenses chargeable to the individual units being serviced and repaired.

7. Considering the fact that this shop is located adjacent to the Machine Shop and Blacksmith Shop, the assortment of various types of power tools and equipment is believed ample, especially since the larger jobs are being sent out under the annual contract procedures. This shop, however, lacks facilities for cleaning and washing dismantled and dis-assembled parts and adequate testing and analyzing equipment.

E. Truck Shop

This shop is engaged in the servicing, repair and maintenance of approximately 430 units of heavy duty trucks and other motorized mechanical equipment such as street sweepers, flushers, eductors, tractors, air compressors, etc. The staff consists of 1 Foreman Auto Machinist, 11 Auto Machinists and 2 Garagemen.

In addition, 2 machinists are regularly assigned to "field maintenance" and repair of mechanical equipment in public buildings, sewage pumping stations, etc.

The shop procedure is similar to that in the Automobile Shop; the foreman inspects the vehicles as they are brought in, determining what is to be done, preparing the work order, and assigning the job to 1 or 2 mechanics, depending upon the nature and scope of the work to be done.

1. In general, the type of work done in this shop is in the nature of heavy equipment repair and maintenance, requiring considerably longer than repair jobs in the Automobile Repair Shop. However, larger work, such as complete engine overhauls, are also sent out under the annual blanket contractual purchase agreements.

2. Actually, including those [illegible], your [illegible] may be had of this shop's activity by the total number of work orders processed in a given period which, during a year and a half have averaged 2[illegible] per month or about 1[illegible] per work day or 1.2 per mechanic day.

3. The same machine shop and blacksmith shop are available to the truck shop as to the automobile shop. Other power tools and equipment appear adequate for the type of work being done (considering that engine overhauls are sent out).

4. The hydraulic lifts installed when the shop buildings were constructed are too light to handle large trucks and other heavy motorized units thus making this shop equipment useless.

   Similarly, the overhead chain blocks and the steel beams from which they are suspended do not permit such heavy lifting.

5. The concrete pits for underneath accessibility and servicing are also reported to have been incorrectly located and positioned, making their use practically negligible.

6. These deficiencies in design and handling of equipment create a sizable handicap to good, economical and efficient shop performance.

7. The many different types and makes of trucks and other heavy motorized equipment make it difficult, if not impractical, to stock an ample supply and variety of parts and accessories needed in the maintenance and repair operations; requiring considerable time in constantly procuring the required parts from local and distant sources of supply, often requiring the personal time and attention of the individual mechanics, garagemen and/or storekeeper with consequent delays in completion of the work orders. Part of this problem results from the fact that approximately one-third of the trucks are 1951 or prior models.

   As a direct result of this situation, the storeroom cannot fulfill its intended purpose to the fullest extent in serving and expediting the repair and maintenance operations.

8. Much of the work of this shop is repeatedly involved in modifying heavy equipment units to provide changes, additions, and new features believed to be necessary to improve their utility or increase their strength for better and prolonged usage. New units are often "shopped" in this manner immediately upon their delivery from the manufacturer and before they are placed in actual service.

This practice suggests possible lack of technical attention to design and specification requirements in preparing the bidding and purchasing documents for such specialized equipment; the possible over-emphasis on accepting the "lowest bid" to the detriment of actual performance ability; or the possible over-enthusiasm and "fussiness" of certain officials or mechanics to improvise "new gadgets" and "innovations." Management explained that most such modifications result from weaknesses which develop from use of the equipment or occur on new equipment when modification after purchase is more economical than the added cost if modified by the manufacturer.

9. As in the Automobile Shop, the Truck Shop is not being utilized to maximum capacity, considering the relatively large investment in building, equipment and facilities; also in view of the fact that similar work is being done in other locations, as for example, the Golden Gate Park Shops.

C. Fire Shop and Aerial Shop

This shop is engaged in the maintenance and repair of various types of motorized equipment and apparatus used by the Fire Department, such as: pumpers, hose wagons, triple combination units, tractors and aerial ladder trucks, including related mechanical and component parts.

The staff consists of 1 foreman auto machinist, 8 auto machinists and 2 garagemen, including 1 auto machinist assigned to field maintenance and minor repairs to all automotive units of the Fire Department.

The general work order and timekeeping procedure is similar to that followed in the Automobile and Truck Shops excepting that the individual jobs are much larger and require much longer to complete.

The individual jobs are initiated by a Fire Department officer in submitting a list of things to be done at the time the unit is brought into the shop for attention, and may consist of complete engine overhaul, converting water tank wagons to triple combination rigs, adding or modifying the design of old apparatus, installing additional or unusual components, and even modifying newly delivered units to meet needs which are necessary or believed to be desirable.

Separate space, designated as the Aerial Shop, is operated in conjunction with the Fire Shop, principally to accommodate the larger and longer "tractor-ladder truck" combinations; the jobs including repairs to the mechanical features as well as modifications of the aerial ladder truck body and components.

1. Regardless of the scope, importance, and difficulty of the work in this shop and the number of work orders underway at any given time, only 1 or 2 mechanics are assigned to each job, making the relative progress slow and delaying completion accordingly.

   This leaves the impression of too many units being worked on at one time, thus causing more apparatus to be kept out of service or for longer periods than necessary.

   An example was that 4 large aerial ladder trucks were in the shop at the same time. One of them was a newly delivered unit which had never been in service; the others, a wreck, a major engine repair, and a conversion to modernize an old unit.

2. In addition to heavy mechanical work, the conversion and modification of such large apparatus usually requires large amounts of body work, followed by high-class paint jobs.

3. A total of 5 mechanics were working on the 4 aerial ladder trucks, and it was stated that it would probably require 3 or 4 months for this work to be completed.

4. The Fire Shop also has access to the Machine Shop and Blacksmith Shop facilities, so the immediate and available machinery, power equipment, and tools appear adequate.

5. As previously noted in the Truck Shop, hydraulic lifts are too light and cannot be used. The pits provided are seldom used because the fire apparatus chassis are normally high enough above the floor to provide ample room for working underneath.

D. Ladder Shop

This Shop is maintained in conjunction with the Fire Shop and is staffed by 2 patternmakers who are engaged in the maintenance and repair of wooden ladders; also making patterns for various metal items, fittings and parts as may be required. A supply of ladder stock is kept in a shed at some distance removed from the shop.

1. At the time of visit, one patternmaker was engaged in the manufacture of a 35 ft. fire ladder, entirely by hand, the approximate cost being quoted at $10 per foot. It was stated that such ladders are far superior to those stocked or manufactured by suppliers.

2. It would seem more practical to confine the operations to maintenance and repair, rather than to compete with outside ladder manufacturers, by manual methods, especially in view of the considerable backlog of ladder repair work on hand.

E. Hose Shop

This shop repairs and services a wide variety of hose fittings, equipment, and parts; also tests hose and inspects the manufacture of new hose to assure compliance with specifications and purchasing requirements. One machinist is assigned to these varied and inspection details.

1. Because there is no fire hydrant located on the shop premises, it is necessary to take the hose and fire apparatus to the nearest available street hydrant for equipment testing.

F. Upholstery Shop

This is also an auxiliary service shop designed for upholstering all types of automotive equipment and furniture. Actually, most of the present efforts are confined to the making of salvage and cleaning covers, tarpaulins, straps, belts, and protective devices for Fire Department usage. One leatherworker is assigned to these duties.

1. The work carried on is necessary in order to provide, maintain, and repair this auxiliary Fire Department equipment.

   However, under these circumstances, the intention to provide general upholstery service for all types of automotive vehicles and furniture cannot be carried out, necessitating many such jobs being sent out.

2. Trunk quarters and facilities permit for greater and better utilization for all types of upholstery, leather-working, and related activities.

G. Body Shop

This shop was established to repair and rehabilitate damaged bodies of all types of automotive vehicles and equipment, as well as to repair radiators and fabricate various sheet metal items, as required. It is staffed by three fender and body workers.

Actually, most of the work is now confined to sheet metal and body and fender work involved in the conversion and modification of fire apparatus and heavy motorized equipment, allowing little time for general passenger car body and fender work.

1. As a result of the present situation, much of the general body and fender work is sent out to commercial shops, excluding only the small jobs which can be handled in connection with the shop repairs.

2. The space, equipment, and tools available for general body and fender repair purposes could accommodate more work and could be developed into a modern automobile body shop of maximum utilization and service.

3. Present doors of this shop are too small to allow large trucks to enter.

H. Machine Shop

This shop is operated in conjunction with the Automobile, Truck, and Fire Shops for machining and manufacturing parts, as needed, and for maintaining and repairing a wide variety of pumps, valves, compressors, etc., both in the shop, as well as in the field. It is staffed by 3 machinists who operate the various metal working machinery and power tools depending on the nature of the work required.

The present space is not formally laid out, nor the machines permanently set up, because it is intended to move the Machine Shop activities to another location now being used for aerial ladder truck repairs, and move the Aerial Shop to the larger vacated Machine Shop.

1. Considering that only three machinists are regularly assigned to this shop, and that it is operated largely on a standby and as-needed basis to serve the three repair shops, the large number of metal working machines is believed to be excessive. At present there are 22 such machines, including six lathes of various sizes, the largest having a bed length of about 20 feet. Other multiple installations are two shapers, two drill presses, two hydraulic presses, two power hack saws, and three emery wheels. Management advises that some of these units will be discarded when the new location is established.

2. Separate observations on several different days indicated very little activity in this shop or in the operation of any of these machines. It was reported that the machinists perform other duties in the repair and conversion of various types of equipment.

3. A room at one end of the shop, used for storing metal working tools, dies, drills, etc., and presumably intended as a tool crib, is entirely open at one end allowing complete freedom and access, and is devoid of any control.

4. In view of the very limited usage observed, the very extensive investment in facilities, machines, power tools and appurtenances, it is believed to be entirely too extensive, and this entire operation might be reduced.

I. Blacksmith Shop

This shop occupies part of the same area as the Machine Shop. Its activities include the forging, forming, and tempering of metals, and the design and fabrication of parts, tools, dies, etc., as needed in the three shops. The staff consists of three blacksmiths and two blacksmith finishers.

The space and equipment is not formally laid out, nor are the units permanently installed. However, it will not be moved to the Aerial Shop, but will remain in the present building.

1. Considering the complement of blacksmiths and finishers assigned to this shop, it does not appear to be as over-equipped as the Machine Shop, but several separate observations indicated little activity or demand. It is reported that one of these employees works as a welder, and he also installs as well as fabricates parts, etc.

2. Its need on such a large scale is not evident, and the entire operation might be reduced.

J. Paint Shop

The purpose of this shop is to refinish all body and fender repairs as well as repaint all types of automotive vehicles and equipment; also to refinish fire ladders, apply gold leaf designs, do lettering, striping, apply decals, and refinish office furniture and fixtures.

Three Car and Auto Painters are assigned to this work. Because of the availability of a spray painting booth at the Public Works Yard, one of these painters was temporarily assigned there, engaged in repainting Public Works Department trucks and motorized equipment.

1. Considerable time is devoted to refinishing Fire Department apparatus, especially those additions, modifications, and rehabilitation jobs previously mentioned, leaving little time for general repainting of passenger cars, trucks, and other mechanized mobile equipment units.

2. The extensive gold leaf and striping work done on fire apparatus is slow and costly, raising the question as to the advisability for this policy and practice to the extent noted.

3. With reference to passenger cars, trucks, and other motorized equipment, a wide range of colors was observed, necessitating the purchase and stocking of many varieties and colors of paint, suggesting greater consideration of color standardization.

4. Under the above conditions, a well-ordered painting program to serve all types of City-owned passenger cars and other motorized equipment cannot be carried out, as a result of which, much work is being sent out to commercial shops, or not being performed.

K. Battery Shop

One Auto Machinist is assigned to this shop. He inspects and charges batteries, repairs electrical systems, overhauls carburetors, etc. He also repairs magnetos, generators, portable lighting units, pumps, and other similar mechanical and electrical units. A stock of various types of new batteries is maintained in the shop for issuance as worn out batteries are removed.

1. Judged by the wide range of electrical work done, this is more appropriately an auto electrical repair shop and is a necessary service in conjunction with the Central Shops.

2. Stocks of new batteries could profitably be under the control of the Storekeeper.

L. Tire Shop

Two Garagemen are assigned to this shop, which is responsible for changing, repairing and mounting automobile and automotive equipment tires of various sizes, balancing wheels, and providing emergency field tire service. A large stock of tire-mounted spare wheels is maintained in an adjacent storage area.

1. This tire storage area was originally designed as a motorcycle repair shop, which is now maintained at a separate location in the City.

2. Ownership and control of tires is now considered a separate departmental responsibility, rather than centralized in the Central Shops.

M. Gasoline Service Station

One Garageman is assigned to this location, which consists of a gasoline service pump, a hydraulic lift, and standard equipment and tools for servicing, lubricating, steam cleaning, and washing cars.

1. Based on several separate days' observations, little activity was observed in rendering any of these services.

N. Vehicle Parking and Storage Sheds

At the rear of the property, and extending the full length of the main Central Shops building, this reinforced concrete "shed" was designed to be used to park vehicles and equipment awaiting repair or disposition.

Actually, this excellent structure is being utilized primarily for the storage of old and obsolete machinery, equipment, tools, wrecked trucks and cars, and a wide assortment of junk and scrap materials.

1. This newly-constructed facility is not being used to best advantage, and requires attention to improve the over-all housekeeping, as well as to dispose of all unwanted and unnecessary items.

2. This space could then be used for the parking and servicing of automobiles, trucks, and other motorized equipment, and for storage of units awaiting to be repaired.

3. The presence of such large quantities of obsolete machines, equipment, and scrap materials seems to point a lack of attention and follow-up being given to their systematic disposal, which, together with the situation observed at other locations, would probably bulk into a sizeable and worthwhile operation. Some of these items are potentially valuable, and could be sorted and separately stored.

Shops at Other Locations Throughout the City

A. Southeast Sewage Treatment Plant Shop

This shop is established in a sewage treatment plant building, immediately across the street from the Central Shops, to perform machine shop work in connection with the repair and maintenance of the machinery and related operating equipment. It is presently staffed with two Machinists, one on a temporary basis.

The shop is equipped with seven metal-working machines, including: One large lathe (about 20 ft. bed); one large, and two smaller drills; one hydraulic press; one power saw; and one power grinder.

The work involves machining pump shafts and sleeves, fabricating special parts, and general operating maintenance.

1. In view of the proximity of the large and extensively equipped Machine Shop at the Central Shops across the street, this entire facility might be dispensed with. This plant has a regular, full-time operating and maintenance crew on a three-shift basis. The Machinists participate in performing plant maintenance.

2. Standard and replacement parts most frequently required on the basis of experience could be fabricated at the Main Shop and kept on hand for emergency use.

B. Richmond-Sunset Sewage Treatment Plant Shop

This shop is also maintained in connection with the repair and maintenance of regular Sewage Treatment Plant equipment. One Machinist is assigned at this location. The major equipment consists of one large (12 ft. bed) lathe, one drill press, and one grinder. The nature of the work is similar to that at other sewage treatment plants. The Machinist participates in performing plant maintenance.

1. Even though this shop is somewhat removed from the Central Shops, the probable average activity does not appear to warrant a separate machine shop at this plant.

2. At the time of visit, it was explained that the Machinist was at the Control Shops using the equipment there. The lathe was not installed, being set aside and covered with canvas.

3. This plant is staffed with Operating Engineers on all three shifts, consisting of one Chief Operating Engineer, six Operating Engineers, and five Junior Operating Engineers.

4. In view of the above situation, it appears feasible either to discontinue the separate machine shop operations at the location and utilize the facilities at the Central Shops, or continue the separate machine shop under the jurisdiction of the Sewage Treatment Division of the Bureau of Sewer Repair and Sewage Treatment.

C. Northpoint Sewage Treatment Plant Shop

The arrangement and work performed here is similar to that at the other two Sewage Treatment Plants above described. One Machinist is assigned to this shop. The equipment consists of one 78" lathe, one large, and one smaller drill press, and one power grinder.

1. As at the other locations, the observed machining activity at the time of visit was negligible.

2. As at the other plants, regular operating engineers are stationed here.

3. In view of the above situation, it appears feasible either to discontinue the separate machine shop operations at this location and utilize the facilities at the Central Shops, or continue the separate machine shop under the jurisdiction of the Sewage Treatment Division of the Bureau of Sewer Repair and Sewage Treatment.

D. Golden Gate Park Shop

This separate shop was established for the maintenance and repair of automobiles, trucks, and miscellaneous equipment, such as power mowers, compressors, etc., used by the Park Department. It is staffed by a Foreman Auto Machinist who plans, supervises, and inspects the work of three Auto Machinists and one Garageman.

The shop is well equipped, principal items including: One (6 ft. bed, 16" swing) lathe, one (4 ft. bed lathe, 12" swing), one hydraulic press, two power grinders, 2 truck lifts (24,000 lb. capacity), one automobile lift (15,000 lb. capacity), one A-frame hoist; also wheel-balancing and tire-changing equipment. A pit is also available, but seldom used.

A total of approximately 270 units are maintained, repaired, and serviced at this location, including:

66 passenger cars and trucks
20 tractors, graders, etc.
47 miscellaneous units (sprayers, generators, etc.)
63 hand mowers.

Shop repairs to motor and trucks are reported to be [illegible] 71 per month, an average of about 1.7 per man-day. Motor repairs average about 44 per month, or about two jobs per man-day.

1. The shop procedure here is similar to that followed at the Automobile and Truck Shop at the Central Shops, but the record keeping is less formalized.

   a. The Standard Work Order is not employed; merely a one-copy shop order is used instead, which is signed by the Foreman when the job is assigned to the Mechanic, but is not signed nor dated when the work is completed.

   b. The Mechanic's time is not kept nor distributed to the separate jobs.

   c. The Foreman keeps an improvised, hand-ruled time record, which is transmitted to the Central Shops for payroll purposes.

2. The Foreman makes local petty purchases from his personal cash, there being no fund established for this purpose. The regular Delivery Order form is used (one copy only), which is given to the vendor. The Foreman keeps a "journal" listing of all purchases, and is reimbursed by the Storekeeper at the Central Shops on the basis of the invoices covering the purchases.

3. The Foreman keeps extra recap tires on hand. These are not inventoried, but are charged out against the above-mentioned monthly allotment for the shop operation.

4. A record is kept of gasoline issued to the nearest gallon, posted on a daily form, but no use is made of this and no reconciliation is made with the actual quantities delivered to the two pumps; the bulk delivery tickets being merely signed and then transmitted to the Superintendent at the Central Shops.

   The Foreman is also responsible for gasoline tanks located at each of three other Park locations. A record of the issues is made by the Park Foreman at each location during the month, and then merely transmitted to the Park General Foreman for filing.

5. The Foreman participates in the shop operations to some extent, mainly in fabricating and machining parts, especially for power mowers (including shafts, parts, rollers, etc.), maintaining a small steel stock for this purpose. Mowers are of various makes and models.

6. One Mechanic is assigned practically full time to the maintenance and repair of power and hand mowing equipment, leaving only two Mechanics for the maintenance and repair of automobiles, trucks, and other motorized equipment.

7. In view of the small number of automotive units involved and the four employees assigned, the need for a "Foreman" position, rather than a "lead man," is questionable.

8. A passenger car was observed to be in very evident need of upholstery repairs, but it was stated that such jobs are usually sent out to commercial shops rather than to the Upholstery Shop at the Central Shops.

9. The transfer of all substantial repair jobs to the Central Shops would limit the work to that comparable with an ordinary commercial service station.

E. Police Garage

This facility is located in the basement of the present Hall of Justice building, being operated under the supervision of a sub-Foreman Auto Machinist, aided by two Auto Machinists and four Garagemen, engaged, mainly, in making minor repairs, tune-ups, and adjustments of approximately 100 passenger cars; also, in rendering related services, including tires, batteries, spark plugs, etc.

The larger repair jobs are sent to the Automobile Shop at the Central Shops with an "Automobile Repair Order" form indicating the work to be done.

These facilities will be moved to the newly-completed Hall of Justice building and the Police Service Station being constructed about a block to the west.

1. The Foreman keeps a running record of cars repaired and of the services rendered; but no time and cost records are kept by individual jobs. The daily time of the crew is kept in a time book and phoned in to the Central Shops office.

2. As at other locations, no preventive maintenance program is established.

3. No lift hoist or pit is provided. All lubrication work, oil changes, and washing jobs are sent out to commercial shops at yearly contract rates.

4. The Foreman maintains small stocks of commonly used parts and supplies, and a number of new batteries. Replenishments or additional items are required by processing Standard Delivery Order forms through the Central Shops.

5. Police officers service their own cars with gas, water, air, and windshield washing. Each officer posts the exact amount of gasoline received to a continuous receipt book system, serially numbered, and indicating "start" and "finish" pump meter readings. Tickets are subsequently filed by car number.

6. Bulk gasoline deliveries are receipted and accounted for, and properly reconciled with the issuances and gauged quantities on hand.

7. The facilities, equipment, and personnel requirements will have to be reappraised in connection with the moving of the garage and services to the new Hall of Justice and the nearby Service Station.

F. Motorcycle Garage

This facility is located at the Southern Police Station and is attended by one Garageman. A total of about 165 Police motorcycles and three-wheelers are garaged here and given minimum service, such as: Brake adjustments, tire changes, oil replenishment, battery work; and various repairs to sirens, lights, brake pedals, etc. A small, locked storeroom is maintained for keeping small stocks of tires, tubes, flares, etc.

1. The apparent minimal service rendered is due to the arrangement with the manufacturer's local area representative who carries out a contractual service arrangement somewhat similar to a preventive maintenance program on a "flat rate" or "per job" basis for different kinds of work. These contractual services include lubrication, washing, and general servicing, and specific repair jobs.

2. Officers gas their own vehicles and keep a detailed record similar to that in the Police Garage, as previously described.

3. Gasoline deliveries are made usually without any Officer or other person being present; the procedure being for the driver to "stick" the tank, fill it, and then make out and leave the delivery ticket.

4. In view of the above repair and servicing arrangement, the Motorcycle Shop, designed in conjunction with Central Shops, has never been utilized for this purpose.

5. The possibility of making all such repairs at the Central Shops in lieu of the present "manufacturer's monopoly" contract, might be fully explored.

6. The present facility for parking and servicing motorcycles and three-wheelers is very inadequate, being long outmoded; and, in fact, never intended for this purpose originally. Its removal to the new Hall of Justice building and nearby Police Service Station will be made upon completion of these facilities.

G. Department of Public Works Army Street Gas Station

This facility is located at 2323 Army Street, and is used primarily for servicing and minor repairs of department automobiles, trucks, heavy motorized equipment, and various auxiliary equipment units and accessories, including recharging of batteries and electric lanterns.

The mechanical inspection, servicing, and repair work is done by one Auto Machinist, and the gas station work, by three Garagemen, two on a night shift, and one during the day.

1. There is no formalized preventive maintenance schedule in effect, although the Auto Machinist endeavors to establish some rotation for inspecting and servicing the individual units.

2. The usual types of such service are limited to motor tune-ups, and to motor repairs, adjustments, etc., to various small electric- and gasoline-powered auxiliary units.

3. Most of the servicing is done during the night shift, when the two men on duty attend some 80 to 90 units; the usual practice being to drive each truck from the parking shed to the "gas station" for replenishing gasoline, oil and water, and lubrication, as necessary. Service rendered is recorded on tickets for each unit, and a consolidated daily statement of gas and oil issued is prepared and the total gasoline reconciled with the meter reading on the pump, but not with the gauged amount remaining on hand in the tank.

4. Passenger cars and light trucks are lubricated on a rather informal and unscheduled basis, usually the bulk of this work being done on Saturday mornings on overtime.

5. If a formalized preventive maintenance program were organized and carried out at the Central Shops, it would be necessary merely to operate this facility similar to a commercial service station, providing for one "gas station attendant" during the day, and one at night. The night attendant could be provided with a gasoline cart for servicing trucks and other motorized equipment in their respective stalls.

H. Department of Public Works 19th Avenue Garage

This is a District Office and Yard for the parking and minor servicing of about 20 trucks and heavy motorized equipment units. It is attended by one Garageman who dispenses gasoline, oil, and water, and lubricates the units at intervals. He parks the units at night in the sheds, and readies them for morning use.

The following types of equipment are based at this location:

2 Catch Basin Eductors (two motors on each)
5 Mechanical Street Sweepers
11 Trucks.

1. The attendant carries out an informal servicing schedule and notifies the respective drivers on a periodic allocation basis as to the date on which the unit is to report for servicing. He also assists the street sweeper operator in making broom changes, and maintains the Yard and Office in clean and orderly appearance.

2. Records of daily issuances of gas and oil, and receipts for bulk deliveries are maintained, and totals reconciled with balances on hand. Monthly recapitulations are transmitted to the Central Shop Office.

3. The relatively small number of units based at this location raises the question as to whether this facility might be closed entirely and the property disposed of; transferring the equipment, etc., to the Golden Gate Park Shop. At that location, "gas station" servicing could be provided, and preventive maintenance and repair work could be performed at the Central Shops.

I. Department of Electricity Garage

This is the Headquarters Office and Yard of the Department. One Garageman is assigned to the servicing of about 40 automotive units, parking the vehicles at night, and readying them for morning use. The facility has no grease rack, pit, or hydraulic lift. Gas, oil, and water service is available, and cars are greased from underneath.

1. Due to lack of sufficient workload and ample equipment, only minimum "car-side" service is available at this location; suggesting the possibility of having all normal servicing done at the nearest available location, as for example, the new Hall of Justice Service Station.

2. If and when the proposed new Department of Electricity headquarters building is constructed, consideration could be given to having all the motorized equipment routine servicing and preventive maintenance done at the then nearest, properly equipped location designed for that purpose.

3. The Garageman also operates as a Yardman and makes deliveries, when required, to crews working at various field locations.

J. 15th and Harrison Streets Gas Station

This facility is located across the street from the Central Warehouse. Its present purpose is to render "gas station" service to the Board of Education automobiles on a part-time basis. One Garageman is on duty for two hours on each of two days per week to dispense gasoline and oil.

1. Considering the investment in property and equipment at this location, the facility could be dispensed with entirely and the services rendered at some other location, as for example, the new Hall of Justice Service Station. It is reported that such disposition is currently being planned.

K. Health Department Garage

This facility is established in the basement of the Health Department Building, and is used for parking Department passenger cars and Emergency Hospital ambulances. One Garageman is in attendance, dispensing gasoline, oil, and water to approximately 34 units. He also washes and lubricates the cars as necessary. A gasoline pump is maintained on the street level adjacent to the garage entrance.

1. The apparent workload and activity does not appear to warrant the full time of one attendant.

2. The gasoline pump at the street level is under the jurisdiction of the Health Department. It was noted to be unlocked and unattended at times, and accessible from the street and sidewalk.

3. Arrangements could be made to service the units at the Hall of Justice Service Station.

4. If the above were done, Garageman position could be abolished.

Management and Accounting

The Office of the General Superintendent of Shops is located at the Central Shops Yard. He is responsible for all activities relating to the maintenance, repair, and overhaul of all types of automobiles, trucks, motorized heavy equipment, and auxiliary mechanical units at the various City plants, facilities, and installations, with the exception of those units repaired at the Water Department Yard and the Municipal Railway 24th and Utah Shops.

1. The present efforts appear to be directed principally at processing the time and material documents concerned with the Central Shops and shops at other locations in order to reflect proper encumbrances and expenditure records necessary for budgetary control purposes, not only for the shop operations alone, but in connection with individual departmental allocations for their respective vehicle and equipment repair and maintenance purposes.

2. Some consideration has been given to establishing a City-wide program and procedure to cover the operation, servicing, repair, and maintenance of all types of automobiles, trucks, heavy motorized equipment units, etc., under a unified, centralized organization, administration, and control.

3. It is not unusual for large public jurisdictions to have some centralized equipment authority, at least to a substantial degree, embodying such activities as:

   a. Central "ownership" of all units under which monthly or annual charges are made for the use of the vehicles and equipment to the departments to which they are assigned. Such charges include depreciation, maintenance, tires, etc.

   b. Central shops for their servicing, maintenance, and repair.

   c. A well-organized and administered preventive maintenance program covering all classes and types of vehicles and equipment.

   d. A policy and practice of making all types of repairs, overhauls, and maintenance to the fullest extent possible leaving an absolute minimum of work to be "farmed out."

e. The establishment of a complete accounting system and procedures for accurately determining all labor, material, and overhead expenses on a per-vehicle and fleet basis to furnish accurate billing to the benefiting departments.

f. The preparation of uniform monthly reports for the information and guidance of management and others concerned to establish criteria for interpreting relative costs, operating performance, and replacement policies.

4. At the time of visit, it was pointed out that considerable progress was being made in the adoption of improved forms, procedures, and records pointing in the general direction of of the foregoing comments, apparently in conformity with a recently completed survey and report by an outside consultant.

5. While this is a distinct improvement, it is felt that its scope is limited to the present somewhat restricted responsibility lodged in the Purchasing Department, through charter and other local legal and administrative provisions, rather than embracing an over-all independent agency to include every phase of these important and costly aspects of City-County administration.

Until accurate unit costs are available, it will be difficult to establish satisfactory criteria for judging the merits of the many separate facilities and operations now carried on.

Water Department Automotive Shop

This shop is located at the Water Department Bryant Street Yard in an old, dilapidated, wooden shed-type building. The scope of its activities includes the servicing, maintenance, repair, overhaul, body and fender work, and repainting of all automobiles, trucks, motorized equipment units, and auxiliary equipment operated throughout the Department (excepting Hetch Hetchy).

The approximate number of the various types of equipment are indicated below:

Passenger sedans	48
Passenger coupes	19
Pickup trucks	32
Station wagons	7
Service and Utility trucks	11
Flat-Bed trucks	7
Dump trucks	42
Miscellaneous motorized equipment	24
Total	190

This fleet of automotive units and auxiliary equipment is deployed over a large area, including both the entire City and County and the adjoining Peninsula and Alameda Districts. With the exception of some minor repairs at one of these outlying locations, all work is handled at the Bryant Street Shop. The staff consists of one Automotive Machinist acting as a working Foreman, three Automotive Machinists, one Body and Fender Man, and two Garagemen. A Laborer is used on a part-time, as-needed basis to assist the Garageman.

The shop is equipped with three twin-post hydraulic lifts of 18,000 lb. capacity. Heavy machine work, when needed, is done at the regular Machine Shop nearby.

It is the established policy of the shop to do all types of maintenance and repair work of whatever scope may be necessary, including complete engine overhauls.

A separate Body and Paint Shop is utilized for doing all necessary body and fender repair work and the repainting of all automobile and equipment units.

1. The Superintendent maintains an improvised preventive maintenance chart listing all units to be serviced over a six-months' period. "Service tags" are provided for use of the Garageman in recording the date, car number, speedometer reading, and type of service rendered. This information is later posted to the control chart.

2. If the Garageman notes any defects in the course of his servicing, he prepares a "Machine Shop Repair Order" for the attention of the Shop Foreman. The Foreman makes a further detailed mechanical inspection and supplements the order with instructions as to the repair work required, and the unit is taken out of service. The completed repair orders, as well as the service tags, are filed by vehicle number for future reference.

3. Heavy duty motorized equipment units (other than trucks) are greased by their respective operators each time they are taken from the Yard.

4. Gasoline and oil are dispensed to the units parked in the Yard overnight by a Garageman who comes on duty at 5 a.m. and uses tank carts for supplying the gas, diesel fuel, and oil. By 8 a.m. the fleet is ready to move. Other units not regularly stored at the Yard are serviced from the regular tank as they drive in each morning, and by 9:30 a.m. all cars have been serviced.

5. The Garageman keeps a record of the quantities issued to each vehicle, and submits a daily sheet to the Storekeeper for checking and transmittal to the Yard Office Clerk for posting. A monthly report is prepared showing, by car number and operator, the mileage traveled, the gallons of gasoline received, quarts of oil used, and the average number of miles per gallon.

6. The fact that major repairs, overhauls, and body and fender work, as well as repainting, are all done by this relatively small shop, indicates the possibility and opportunity for adopting a similar policy and procedure at the Central Shops, which were presumably designed and constructed for this purpose and have potential capability to serve on a much more extensive scale.

Municipal Railway Automotive Shop

This shop is operated as an adjunct to the larger diesel bus repair and maintenance garage at 24th and Utah Streets. Its purpose is to service passenger cars, trucks, and heavy duty motorized equipment units not normally considered part of the transit fleet.

The approximate total number of vehicles and related equipment consists of:

Passenger cars	31
Trucks	54
Miscellaneous and Auxiliary Units	27
Total	112

In addition to the above, this shop is responsible for the maintenance and repair of automotive equipment operated by several other agencies under the jurisdiction of the Public Utilities Commission, as indicated below:

Hetch Hetchy Project	9
Airport Department	14
Bureaus of Light, Heat and Power	3
Public Utilities Commission	1
Total	27

The staff consists of one Automotive Machinist Foreman, two Automotive Machinists, and five Garagemen who are engaged in rendering various types of services, repairs, and maintenance, excepting complete engine overhauls, which are handled in the general Machine Shop located adjacent to this facility.

Two heavy-duty twin-post hydraulic lifts are installed in the shop area for handling all maintenance and repair jobs.

The gasoline and oil servicing operations are considerably separated from the shop. They are adjacent to a yard area where the trucks and equipment are normally stored when not in use.

Trucks based at the Yard are regularly serviced by the Garagemen during the two night shifts, on each of which two men are on duty. Each unit is driven to the shop if lubrication or oil change is required, or to the fuel pumps for replenishment of gasoline, oil, and water, and then returned to their respective parking locations. Diesel fuel is dispensed to some buses based at this Yard.

All repairs are posted to a file of individual vehicle cards to accumulate an historical record of work done for future reference by the Foreman in conjunction with subsequent repairs. The shop work is also recapitulated at year-end for inclusion in the annual report of the Superintendent of Automotive Equipment (Municipal Railway)

A small stock of parts, accessories, hand tools, etc., is kept and controlled by the Shop Foreman, having been "charged out" to him from the storeroom. A small supply of various size tires is also in the custody of the Foreman.

During the time of visit, a backlog of six repair jobs was on hand.

1. The present arrangement of utilizing a part of the transit bus garage for this shop is a makeshift arrangement, and its physical separation from the truck parking area and servicing facilities is awkward.

2. Nevertheless, this improvised shop appears to be following a partial preventive maintenance and general repair program. Considering the small number of Mechanics on duty, a "Foreman" status supervisor would not normally be required, especially since four of the five Garagemen are on night shift.

3. Under the circumstances, consideration might be given to consolidation of these activities with those at the Central Shops.

4. The practice of driving each unit from its parking location to be serviced could be dispensed with in favor of using tank carts for re-fueling purposes, thus eliminating the need for two Garagemen on each of the night shifts.

5. Records of gasoline and oil issuances are good, and the reconciliation with quantities on hand, and accountability for, and distribution of, time and materials used against the individual units appears satisfactory.

Recommendations

General

* 1. The many separate garages, repair shops and service stations be reduced to a minimum and the operations consolidated at the Central Shops to the fullest extent possible, in order to comprise a Central Motorized Equipment Department under the unified supervision of a technically- and professionally-trained and experienced Mechanical Engineer.

2. In view of the excellent newly-constructed Central Shops Building, every effort be made to expand the existing facilities and service to include all City Departments, at least for all substantial repair work, providing for only "gas station" type facilities and minor repairs at selected geographical locations.

A. Automobile Shop

* 1. All City-owned passenger vehicles and light trucks be repaired at this shop in order to utilize its capabilities.

2. With the present availability of a large Machine Shop adjacent to this work area, heavier and more complete repair work be undertaken, including engine overhauls, with few, if any, exceptions, as is now being done at the Bryant Street Shop of the Water Department.

* 3. A formalized preventive maintenance program be established providing for the regular periodic checking, inspecting, servicing, and minor adjustment and repair of each automotive and motorized equipment unit.

* 4. A policy of greater standardization and uniformity of types of vehicles and equipment be adopted to facilitate stocking of essential parts and accessories, and making actual repairs.

5. Vehicles awaiting attention be stored in other areas in order to permit full utilization of the shop area for preventive maintenance and repair operations.

6. A parts cleaning equipment unit be provided to obviate the necessity for manual cleaning and washing of individual pieces or the time involved in taking such parts to an available cleaner in one of the other shops.

7. Testing and analyzing equipment be provided as an essential requirement of a preventive maintenance and repair program.

* 8. Substantial repair jobs on automobiles and light trucks now being performed at the following locations be assigned for attention at the Central Shops:

a. Golden Gate Park Shop
b. Water Department Automotive Shop
c. Municipal Railway, 24th and Utah Street Shop
d. Police Garage
e. Public Works Department

* Charter change may be necessary.

B. Truck Shop

* 1. All City-owned heavy trucks and motorized equipment (excepting transit buses and trolley coaches) be repaired at this shop in order to utilize its capabilities.

2. With the present availability of a large, well-equipped Machine Shop adjacent to this work area, more complete repair work be undertaken, including engine overhauls, with few, if any, exceptions, as is now being done at the Bryant Street Shop of the Water Department.

* 3. A formalized preventive maintenance program be established providing for the regular periodic checking, inspecting, servicing, and minor adjustments and repairs of each motorized unit.

* 4. A policy of greater standardization and uniformity of types of trucks and motorized heavy equipment be adopted to facilitate stocking of essential parts and accessories and making actual repairs.

5. The existing non-usable light hydraulic lifts be replaced with heavy hydraulic lifts to permit ready accessibility for repair purposes and/or removal of heavy parts. Consideration be given to transferring existing heavy hydraulic lifts from shops to be discontinued.

6. Heavier capacity chain block hoists be provided to permit handling heavier loads, such as in raising front ends removing engines, etc.

7. Detail mechanical drawings, descriptions and specifications for all heavy motor vehicles and other motorized equipment units be given meticulous attention and consideration by Mechanical Engineers, Shop Foremen and Shop Superintendents in order to assure acquiring the most suitable machines for the City's specific needs.

8. The policy and practice of frequently modifying and overhauling manufacturers' standard equipment, often immediately upon delivery, be reduced.

9. Vehicles awaiting attention be stored in other areas in order to permit full utilization of the shop area for preventive maintenance and repair operations.

* Charter change may be necessary.

* 10. Substantial repair jobs on trucks and other motorized equipment now being performed at the following locations be assigned for attention at the Central Shops:

a. Golden Gate Park Shop
b. Water Department Automotive Shop
c. Municipal Railway, 24th and Utah Street Shop
d. Public Works Department

C. Fire Shop and Aerial Shop

1. Jobs at these shops be scheduled, worked on, and completed with greater dispatch in order to minimize the number of units and length of time they are kept out of service, especially important apparatus, such as large aerial ladder trucks.

2. To the fullest extent possible, quotations be solicited for all extras and modifications, when specifications are prepared and bids requested, in order to compare such quotations with the cost of performing such work at this shop.

D. Ladder Shop

1. The major efforts of this shop be devoted to repairing out-of-service ladders, and all new ladders be purchased from manufacturers.

E. Hose Shop

1. A fire hydrant be installed in close proximity to the shop to permit testing of hose and fire apparatus.

F. Upholstery Shop

1. The scope of services performed by the present employees be expanded to serve as a central location for all types of upholstery work necessary on passenger automobiles, trucks, heavy motorized equipment, as well as for office furniture, etc., and the practice of sending out work of this nature be reduced to the minimum.

* Charter change may be necessary.

G. Body Shop

* 1. The scope of services at this shop be expanded to serve as a central location for all types of body and fender work except major frame aligning, required on passenger cars, trucks, fire apparatus, and other heavy motorized equipment units for all departments. Work of this nature presently sent out be discontinued, or at least reduced to a minimum.

H. Machine Shop

1. In connection with the recommended centralization of all automotive and other mechanical equipment maintenance and repair at the Central Shops, the Machine Shop needs and requirements be reviewed by a professional Mechanical Engineer or expert Machine Shop Superintendent to determine the minimum number, types, and sizes of metal working machinery required, design the most efficient layout and arrangement of these units, and determine the minimum staffing requirements.

I. Blacksmith Shop

1. In connection with the recommended centralization of all automotive equipment maintenance and repair at the Central Shops, the Blacksmith Shop needs and requirements be reviewed concurrently with the Machine Shop and redesigned and systematically laid out with the minimum required units of equipment, tools, and personnel.

J. Paint Shop

* 1. In connection with the recommended centralization of all automotive and equipment maintenance and repair at the Central Shops, the Paint Shop needs and requirements, including drying equipment, be reviewed based on the recommendation that all possible passenger cars, trucks, heavy motorized equipment, fire apparatus, auxiliary mobile equipment, etc., be repainted here.

2. Consideration be given to eliminating excessive striping, lettering, and gold leaf embossing on fire apparatus in an effort to reduce the time and cost required to refinish these units.

* Charter change may be necessary.

* 3. Colors of automotive equipment be standardized and made uniform to the extent possible in order to minimize the wide variety of expensive paints carried on hand and reduce the time and cost in changing from color to color.

4. Adequate ventilating and rapid drying equipment be provided in this shop.

5. The separate spray booth at the Public Works Department Yard be operated in conjunction with the Paint Shop at the Central Shops, as though it were physically located there, in order to utilize the facilities at both locations to the fullest extent possible.

K. Battery Shop

1. In conjunction with the previously recommended expansion of shop facilities, consideration be given to developing the present Battery Shop to function as a central automotive electrical repair shop, coordinated with the several adjacent Automotive Shops, in order to specialize in rendering complete service to all automotive electrical systems.

L. Tire Shop

* 1. Ownership, storage, and control of tires and tire-mounted wheels be vested in the Central Shops rather than in separate departments. The cost of tires be included in the charges made to the departments for use of the vehicles.

M. Gasoline Service Station

1. The services available at this location be more fully utilized in conjunction with the recommended increase in the Central Shops' operations, and the establishment of a detailed preventive maintenance program.

2. The maintenance of records of issuances of gasoline and oil to individual cars be strictly in accord with the uniform procedures, forms and reports to be developed for the central controlling and accounting for these services, including receipt of bulk gasoline and oil deliveries and periodic reconciliation with balances on hand.

* Charter change may be necessary.

H. Vehicle Parking and Storage Sheds

1. In connection with expansion of the Central Shops' activities, these permanently constructed sheds be thoroughly cleaned out by removing and disposing of all worn-out, obsolete used machinery, equipment, and junk, and the spaces used for temporary storage of vehicles awaiting repair and for auxiliary Repair Shop purposes.

2. Usable parts and accessories stripped from wrecked and salvaged equipment be placed in the storeroom.

Shops at Other Locations Throughout the City

A, B, C. Three Sewage Treatment Plant Machine Shops

1. In view of the fact that the Machinists at these three locations engage in general Sewage Treatment Plant repair and maintenance, these activities be assigned to the jurisdiction of the Sewage Treatment Division of the Bureau of Sewer Repair and Sewage Treatment.

This recommendation is in agreement with the recommendations of the Task Force covering this Bureau regarding the Reorganization of Divisions of the Sewage Pumping and Sewage Treatment Divisions.

D. Golden Gate Park Shop

* 1. Substantial repair jobs be performed at the Automobile and Truck Shops at the Central Shops, and this local shop be discontinued, excepting for minor adjustments and repairs and normal gas station services requiring one Garageman. In addition, the maintenance, repair, and servicing of lawn mowers be retained at this location requiring one Auto Machinist.

2. The maintenance of records of issuances of gasoline and oil to individual cars be strictly in accord with the uniform procedures, forms, and reports as previously recommended under M. Gasoline Service Station.

E. Police Garage

* 1. With the completion of the new Hall of Justice Police Garage and nearby Service Station, the latter facilities be limited to regular "gas station" services and minor adjustments and repairs, and all substantial repairs be done at the Central Shops.

2. Personal servicing of their assigned cars by Police Officers be discontinued.

3. The maintenance of records of issuances of gasoline and oil to individual cars be strictly in accord with the uniform procedures, forms, and reports, as previously recommended under M. Gasoline Service Station.

* Charter changes may be necessary.

4. Personnel requirements at this location be limited to only such Mechanics and Garage Attendants necessary to carry out the servicing and minor repair work mentioned above.

* 5. Additional units from other departments be served at this location, and the charges recorded and processed through the centralized clerical and accounting system for reimbursements by the using departments.

F. Motorcycle Garage

1. The apparent monopolistic practices of requiring all motorcycle repairs to be done by a specific outside vendor be discontinued, and in lieu thereof, a preventive maintenance program be developed to be done by City personnel. Substantial maintenance and repair work be done at the Central Shops in the building originally intended as a Motorcycle Shop but now being used for tire storage.

2. The parking and storage of motorcycles at the Southern Police Station be discontinued, and they be based at the new Hall of Justice Garage. Regular "gas station service" be provided at the nearby Police Service Station. (This transfer has been authorized.)

3. Servicing gasoline and oil to their own motorcycles by Police Officers be discontinued.

4. The maintenance of records of issuances of gasoline and oil to individual motorcycles be strictly in accord with the uniform procedures, forms, and reports, as previously recommended under M. Gasoline Service Station.

G. Department of Public Works Army Street Gas Station

* 1. The use of this location for making minor repairs and adjustments be continued. This work be performed by the Auto Machinist on duty who will also provide normal gas station services. Concurrently, the day shift Garageman position be eliminated.

2. The daily replenishment of gasoline, oil, and water to each individual unit based at the Public Works Yard be continued, but a suitable mobile tank cart be provided for this purpose to obviate the necessity to drive each unit between the parked location and the service pumps.

3. With the use of such a mobile tank cart, one of the two Garageman positions on the night shift be eliminated.

* Charter changes may be necessary.

4. The maintenance of records of issuances of gasoline and oil to individual units, both during the day and night shifts, be strictly in accord with the uniform procedures, forms, and reports, as previously recommended under M. Gasoline Service Station.

H. 19th Avenue Garage, Department of Public Works

1. The informal preventive maintenance program developed by the Garageman at this location be discontinued, and all equipment units be transferred to the Golden Gate Park Garage.

2. The position of Garageman at this location be discontinued.

I. Department of Electricity Garage

1. All automotive servicing at this location be discontinued, and all regular "gas station" services be performed at the new Service Station located near the new Hall of Justice.

2. All preventive maintenance be performed at the Central Shops in accord with the over-all preventive maintenance program.

3. The position of Garageman at this location be eliminated and his other duties assigned to other Department of Electricity personnel.

J. 15th and Harrison Streets Gas Station

1. The intermittent use of this facility for a very limited purpose be discontinued.

2. The Board of Education vehicles now receiving gasoline at this location be serviced from the new Police Service Station near the new Hall of Justice.

K. Health Department Garage

1. The use of this basement area for parking cars be continued, but all "gas station" servicing be eliminated and all cars and ambulances affected receive these services at the new Police Service Station located near the new Hall of Justice.

2. The gasoline pump at the street level be eliminated.

3. The Garageman position be eliminated.

Management and Accounting

1. The emphasis being given to the detailed operations necessary to maintain budgetary encumbrance accounts for individual departments to reflect charges for labor, material, and incidental charges for automotive equipment, maintenance, repairs, and servicing, be discontinued.

* 2. The fiscal and accounting systems, records, and procedures be reorganized to conform to the requirements of a centrally administered City-wide automotive maintenance system.

* 3. This centralized equipment management, accounting, and control be predicated on the principles of:

   a. Centralized "ownership" and control of all automotive equipment. Rental charges be determined by type of vehicle to include all applicable costs except gasoline and oil replenishments.

   b. Establishment of a comprehensive preventive maintenance program.

   c. Expanding the scope of work of the separate shops at the central location to include all types of maintenance, repair, overhaul, body work, and repainting.

   d. Establishing appropriate forms and procedures for recording, costing, and distributing all labor, material, overhead, and operating costs on a per vehicle basis.

   e. Preparation of monthly reports to indicate the monthly and year-to-date total and unit operating cost per mile per vehicle to provide comparative statistical information for management purposes and replacement policies.

* 4. Such centralized equipment "ownership" system be operated on a "revolving fund" basis with the initial working capital being advanced, as a loan from the General Fund, to cover an adequate period required to establish this operation.

* 5. A Passenger Car Pool Service, to be operated on a revolving fund basis, be established as a subsidiary of the over-all program, and to provide for:

   a. Centralized custody of all passenger vehicles assigned to the pool.

* Charter change may be necessary.

b. Establishing schedules of fees for the use of these vehicles on a per mile and/or hourly basis, such fees to be sufficient to return all operating, depreciation, maintenance, repair and overhead costs.

c. Costs covering usage of vehicles be charged to the respective departments on a monthly basis of accumulated trip tickets.

d. Supervision of the Car Pool to be the responsibility of a Dispatcher, together with Garage Attendants, as may be necessary.

e. The Passenger Car Pool be located in the Civic Center area, with the possibility of establishing centrally located branches at one or two outlying locations, such as at the Golden Gate Park Shop.

f. A detailed survey be made of the required number of automobiles to be included in the Passenger Car Pool.

* 6. Concurrently with the establishment of the Car Pool, passenger cars no longer be assigned to individual officials or employees on a regular full-time basis, excepting in those instances where the duties of the individuals are such as to require automotive transportation substantially throughout the day as an integral part of their regular duties.

* 7. All cars personally assigned to individuals or dispatched on a trip basis be personally driven, and no "chauffeur driven" automobiles provided, excepting in cases where the individual may be physically incapacitated or otherwise prevented from personally driving a car. Exceptions to this recommendation be made in the instances of the Mayor, Board of Supervisors, and top Fire and Police Department officers.

* 8. In view of the several separate locations to be maintained for dispensing gasoline and oil, all credit cards currently outstanding be recalled, and thereafter only a very limited number authorized to be issued to specific individuals on the basis of demonstrated need and subject to audit and approval.

* 9. Complete control of gasoline and oil for automotive equipment be vested in the Central Motorized Equipment Department, and proper accounting procedures established to provide proper control.

* 10. A comprehensive centralized preventive maintenance program be established for all automobiles, trucks and other motorized equipment. This centralized program to be performed at the Central Shops because of the specialized testing and analytical equipment recommended for use at this location.

* Charter change may be necessary.

Other Departmental Automotive Shops

Water Department Automotive Shop

* 1. The use of these separate facilities be discontinued, and substantial repairs of automotive equipment be transferred to the Central Shops.

* 2. Only "gas station" service and minor repairs by the Garageman be retained at this Yard to serve the daily operating needs of the cars, trucks, and other motorized equipment based here.

3. The maintenance of records of issuances of gasoline and oil to individual units be strictly in accord with the uniform procedures, forms, and reports, as previously recommended under M. Gasoline Service Station.

Municipal Railway Automotive Shop

* 1. The use of these separate facilities be discontinued, and substantial repairs of automotive equipment (exclusive of transit vehicles) be transferred to the Central Shops.

* 2. Only "gas station" services and minor repairs by the Garageman be retained at this location.

In connection with the replenishment of gasoline and oil in the vehicles parked in the Yard, use be made of a mobile tank car, thus obviating the necessity for driving each unit between its location in the Yard and the pumps.

3. The positions of one Garageman on each night shift be eliminated.

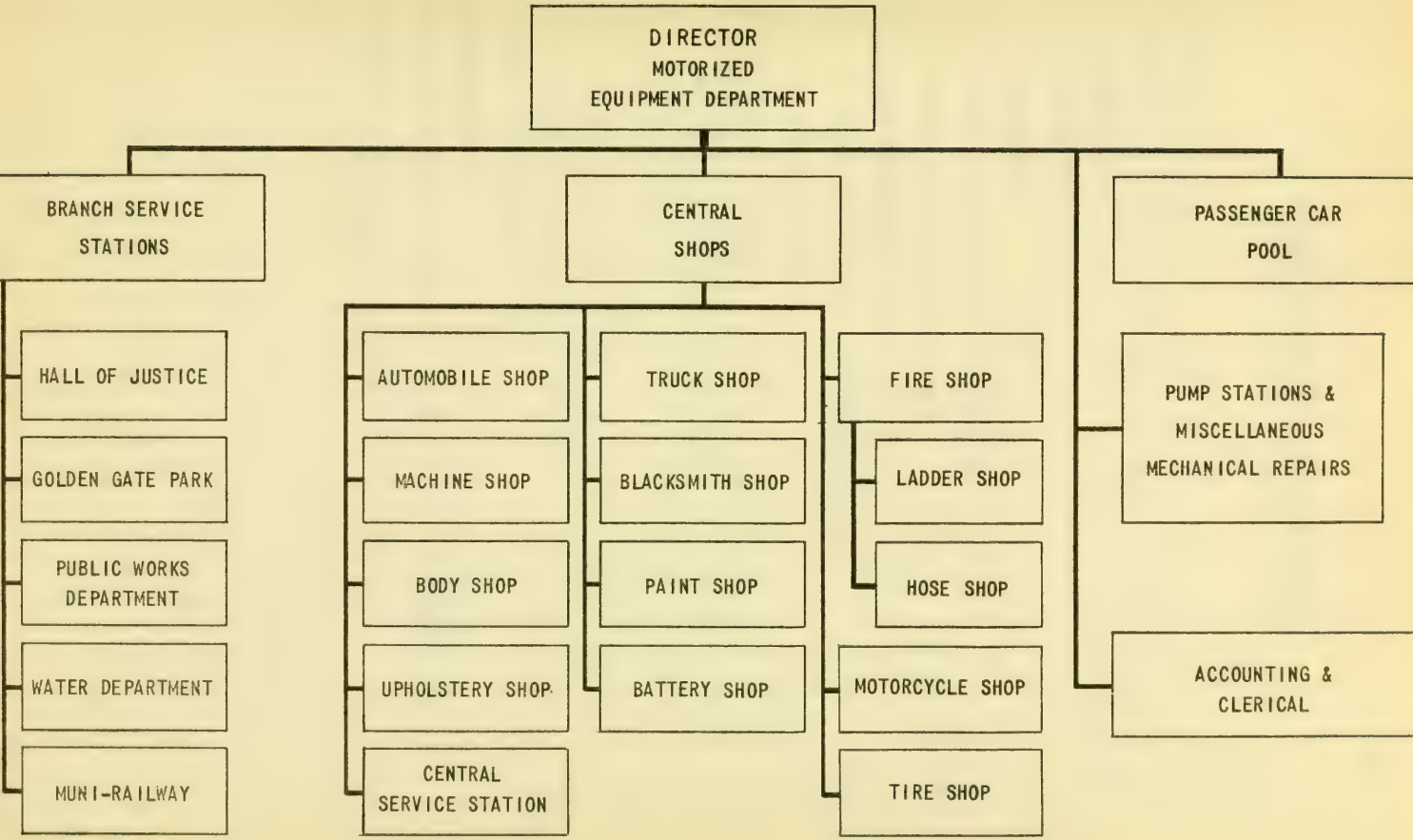
4. The maintenance of records of issuances of gasoline and oil to individual units be strictly in accord with the uniform procedures, forms, and reports, as previously recommended under M. Gasoline Service Station.

Proposed Organization

1. The present Bureau of Shops in the Purchasing Department and other separate departmental automotive shops be reorganized as a central Motorized Equipment Department, substantially as indicated on Exhibit III.

* Charter change may be necessary.

MOTORIZED EQUIPMENT DEPARTMENT



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V. BUREAU OF TABULATING AND REPRODUCTION

Findings

Reproduction Section

As presently established, this bureau may be considered the nucleus of a potential central services agency for the entire City-County organization. It is composed of a Reproduction Section and a Tabulating Section under the direction of a Supervisor of Tabulating and Reproduction.

1. This otherwise satisfactory activity is not functioning to the extent normally considered feasible for a central services agency in a large governmental jurisdiction.

2. A central services agency is not necessarily functionally associated with a central purchasing department and for greatest effectiveness it could be separately organized and administered.

A. Blueprinting

This unit is located in a separate room on the 5th floor of the City Hall, considerably removed from the bureau's office and supervisor in the basement. It is staffed by 3 blueprinting machine operators and is equipped with 2 Ozalid machines, 1 Pease blueprinting machine and a paper cutter.

1. The blueprinting unit could be relocated in closer proximity to the main office and supervisor of the Bureau.

2. Considering the number of machines available, more work could be assumed by this unit acting as part of an overall central services operation.

3. A scale of non-refundable charges for sets of construction drawings issued to prospective bidders could be established to cover the entire printing and handling costs.

B. Photostating

This unit is located in the Reproduction Section main office and work space in the basement of the City Hall. It is staffed by 1 full time and 1 part-time photostat operator. The equipment consists of 1 photostat machine and dryer, 1 vacuum frame, 1 print washer and 2 print dryers. In addition, 2 microfilm cameras are employed for making film records as required.

1. In general this unit is performing a useful service in a satisfactory manner in a congested working area which is not separate from the other photographic and duplicating operations.

2. More fully automatic equipment is available which requires less personal attention and manual operations.

C. Photography

This unit is also located in the main office area of the section and is staffed by 1 photographer full-time and 1 photographer part-time, as needed. The activities are concerned chiefly with making photographs for the Public Works Department in connection with construction progress, for the City Attorney regarding damage claims, accidents, etc., and pictures for the redevelopment and planning agencies. Several types of cameras are available, together with the customary dark rooms and laboratory facilities, including 3 enlarging cameras.

Some photolithography work is done by the photographer in connection with maps, charts and various illustrations used in special reports, brochures and other reproductions.

1. The fact that the space presently occupied has been adapted for the photography operation on a more or less improvised basis points to the opportunity for a better designed and laid out facility.

2. Services performed by this unit could be expanded to cover all photography needs of City departments.

D. Offset Duplicating and Mimeographing

This unit is located in the same general area with the photography and photostat operations in the main office of the reproduction section. It is staffed by 2 duplicating machine operators who operate 2 mimeograph machines and 1 offset duplicating machine in making multi-copies of various annual and special reports, ordinances, bids, specifications, legal forms and documents.

At the time of visit, it was observed that considerable emphasis was given to the use of aluminum offset plates, requiring higher first cost than ordinary paper masters.

1. This appears to be a rather unsatisfactory arrangement for these services, lending an atmosphere of general confusion and appearance of poor housekeeping, [illegible] because of the overlapping of several adjacent working areas.

2. While rendering satisfactory services to a limited extent, this service does not encompass the potential of an adequately designed and fully operated city-wide central duplicating and mimeographing operation. Opportunities exist for extended uses of these facilities for printing of ordinary forms, form letters, letterheads, reports, brochures, pamphlets, etc., for all departments.

3. A duplicating offset machine in a nearby office was observed to be making satisfactory paper mats at far less material and labor costs than for aluminum plates.

E. Section Supervisor and Clerical

The head of the Tabulating and Reproduction Bureau is also the direct supervisor in charge of the reproduction section, the separate units of which have been described in the foregoing paragraphs.

Because there is a separate supervisor in charge of the Tabulating Section, most of the time of the Bureau head is devoted to the reproduction activities and his office is located in a corner of the space (Room 30 City Hall), accessible both to the public space and counter as well as to the work spaces and operations.

The supervisor is assisted by 1 Account Clerk in the processing of the service orders from various departments as well as in handling the general office work.

1. The present dual responsibility of the bureau head for both the reproduction and tabulating activities, while quite satisfactory on the limited scope of services being performed would not be proper if the fullest possibilities of a central services organization were ultimately realized.

2. Under such circumstances, the extension of all of the activities and services to all departments, in the respective fields of reproduction and tabulating, would necessitate separate full-time supervisors.

f. Other Potential Services

Central service agencies normally include other activities in addition to those previously described. A comprehensive survey of the needs of the various departments would indicate which of these could be efficiently and economically established and operated centrally.

a. Clerical, Typing and Stenographic Pool

Variations in workloads, seasonal peaks, emergencies and special occasions occur throughout the city administration where the availability of trained and experienced employees could be used to advantage on a part-time basis, as needed. This would frequently preclude the necessity for employing less experienced or less qualified part-time temporary help or paying premium rates for overtime to regular employees.

A determination could be made of the equivalent number of full-time clerical, typing and stenographic positions which would be required in a central pool in order to meet these variables and peak demands, with the provision that a larger number of positions would be eliminated at the departmental levels.

b. Messenger Service

Inter and intra-department messenger services are employed to some extent on an improvised basis to accommodate specific needs. However, there is no organized and formalized city-wide program by which the numerous departments, agencies and operations can be expeditiously coordinated. This lack of efficient communication is frequently the cause of unnecessary delays in processing important documents and receiving and delivering parcels, packages, equipment, parts, etc. where time elements are essential.

A detailed study of the over-all problem would undoubtedly disclose the need for and advantages to be derived from a centrally established and administered messenger service. This would embody not only inter-department but inter-building routes for which regular daily itineraries and time tables would be established, preferably at not less than on a two-trip per day basis.

c. Mailing Service

While it would obviously not be feasible or advisable to plan for a single centralized mailing operation, a detailed survey would disclose the opportunity for consolidating all mailing now separately handled at the Civic Center. The establishment of a city-wide messenger service, as above mentioned, would add other jurisdictions which could be incorporated in such a central mailing facility.

Provision for special mechanized mail handling equipment at the central location would contribute to the expediting of the entire mailing operation and eliminate much of the time consuming manual methods.

d. Office Equipment Maintenance

Present equipment contracts with separate outside vendors, together with the detailed requisitioning and purchase order procedures, invoicing and paying operations suggest the advisability of studying the possibility of performing the maintenance and repair of office machines and equipment by city forces. Due to the many and ever increasing types, makes, and models of such mechanical and electrical office machines, it may be determined that such a change would not prove beneficial or economical.

Nevertheless, the problem and possibilities could be thoroughly explored to definitely establish the advantages and disadvantages of adopting such a plan as part of the Central Services Department.

e. Telephone Service

The detailed administration of telephone services by individual using agencies is sometimes abandoned in favor of consolidating all separate services under central management. The advantages are many when considering the numerous separate installations, changes, extensions, removals, etc. normally required in meeting the many and varied office and operating needs.

Also directly involved are the related requisitioning, purchasing, invoicing and payment of the many separate departmental telephone services which otherwise could be centrally administered.

A complete survey of the city-wide telephone installations to establish the need and use of each separate instrument could point to many instances for effecting savings, including opportunities for consolidation of branch switchboard facilities. Subsequently, all telephone services could be made the responsibility of the Central Services Department.

f. Information Service

Operation of a satisfactory public information service should be an important aspect of the city's public relations program. Assigning it as a specific activity of the Central Services Department would appear to be a better arrangement than its present allocation as an adjunct of the city administrative officer.

A more central and more conspicuous location of the main information booth now located in the City Hall lobby would make it more noticeable and serviceable to the general public. Its use could be improved and expanded accordingly.

g. Records Retention and Disposal

The problems, policies and procedures involved in record retention and disposal affect every department. While some attention is being given to this matter, its consideration on a city-wide basis could be undertaken with resulting improvements in the current and inactive filing and storage requirements and facilities.

Directly associated, is the entire matter of administering an adequate forms' control program affecting all activities in all departments.

The proper approach to both these problems would require complete cooperation of all operating agencies, at all levels, with the ultimate objective of establishing a central forms' control and records' retention program as part of the Central Services Department.

Central Tabulating Section

The tabulating section provides a centralized service available to all City and County departments. It was established in 1957 for the purpose of accomplishing two objectives:

1. To place electronic accounting machines and other equipment in a central location where use would be made available to all City departments.

2. To eliminate unnecessary duplication of expensive equipment with its attendant cost of operation and maintenance.

This centralized tabulating installation consists of 25 pieces of equipment. The staff consists of 17 operators and a full-time supervisor of tabulating.

The supervisor estimates that about 70% of the work is devoted to processing traffic tickets issued by the Police Department. In addition, many small jobs are done for various departments. Time usage records by type of equipment are not maintained.

1. Despite this favorably reported central tabulating service, there are 12 other installations in departments throughout the City organization, excluding the Board of Education. These 12 involve a total of 107 separate units of equipment including a few units on order or requested in the 1961-62 budget.

2. The relatively small ratio of the central tabulating facility compared with the other city departments and the Board of Education installation is indicated in the following summary tabulation:

Location of Equipment	No. of Units	Monthly Rentals	Monthly Salaries	Monthly Total	% of Total
Central Tabulating	25	$ 3,000	$ 6,700	$ 9,700	12.3
12 Other City Departments	107	19,500	37,000	56,500	71.5
Subtotal-City Departments	132	$22,500	$43,700	$66,200	83.8
Board of Education	22	7,600	5,200	12,800	16.2
GRAND TOTALS	154	$30,100	$48,900	$79,000	100.0

3. On an annual basis, the total costs amount to [illegible], divided as follows:

Central Tabulating	$116,000
12 other city departments	678,000
Subtotal, City Departments	794,000
Board of Education	154,000
Total	$948,000

4. The above summary does not include the contemplated new installation of 7 tabulating equipment units in the Water Department main offices involving an additional annual rental of $10,700 to which must be added the salaries for operating personnel.

5. It is apparent that if the costs for light, heat, power, rental and overhead were added to the above direct equipment and labor costs, the annual total expenditure for tabulating equipment would be considerably in excess of one million dollars.

6. Because practically no equipment usage records are kept, it is difficult to estimate the equipment operating efficiency with any degree of accuracy. At only two installations visited was time kept on the usage of the various equipment units.

7. Estimates obtained indicated that the equipment usage varies from about 30% to 80% of full capacity, due principally to the widely varying demands and workloads in the separate departmental installations.

8. It is recognized and accepted good practice in both commercial and private tabulating installations to provide daily time distribution reports for each unit of equipment in order to appraise its usage and provide opportunity for more efficient scheduling of work and determining operating costs.

9. Such time keeping and scheduling is all the more important in conjunction with centralized operations regardless of whether or not all of the equipment is consolidated at one location.

10. Only a complete and detailed analysis of each installation would determine:

    a. What each installation is doing

    b. The justification and absolute necessity for each operation

    c. The actual time required to accomplish each separate project.

    d. The specific utilization of each unit of each [illegible].

It would then be possible for an over-all supervisor of usage to schedule work to best advantage, centralize as much of the equipment as possible, eliminate units no longer needed, investigate and improve the clerical and related systems and procedures and provide competent centralized administration for these diversified tabulating activities.

11. Such centralized approach to the consolidated usage and management should materially reduce the equipment, manpower, and auxiliary costs for operating the City's total tabulating services.

12. The ultimately adopted centralized work program may require more than the current one-shift operation or certain units of equipment may require more than normal working time in order to permit better over-all scheduling.

    A 2-shift operation would be more economical due to the rental basis for the second shift being only 50% of the base shift rate. This rental saving would substantially exceed premium pay for second shift operation.

13. The potential use of electronic data processing equipment to effect economies in the clerical operations of many departments is currently being explored by several departmental groups. The complex problems included in the determination of work best suited for performance on this type of equipment, the numerous makes and models of equipment available, the time element included in delivery and proper programming for effective use, etc. indicate the desirability of a central committee to properly coordinate the progress in this program.

Recommendations

General

1. The present tabulating and reproduction activities be separated from the jurisdiction of the Purchasing Department and reorganized and established as separate agencies:

    a. Central Services Department.

    b. Central Data Processing Division.

2. Both these agencies be operated on a Revolving Fund arrangement for reimbursement for the services rendered to all departments.

Central Services Department

* 1. The Central Services Department be administered by a Central Services Manager reporting to the Mayor.

* 2. The following existing activities be established as subdivisions of the new Central Services Department:

A. Blueprinting
B. Photostating
C. Photography
D. Offset Duplicating and Mimeographing

* 3. The present activities be expanded to serve the needs of all City departments to the fullest extent.

* 4. The following potentially additional services be reviewed, analyzed and incorporated as units in the Central Services Department, if determined to be desirable:

a. Clerical, Typing and Stenographic Pool
b. Messenger Service
c. Mailing Service
d. Office Equipment Maintenance
e. Telephone Service
f. Information Service
g. Records Retention and Disposal

* 5. The space, equipment and personnel requirements for these activities be based on a comprehensive survey and analysis of the fullest possible economical use of these services and facilities by all departments and the corresponding work and/or purchased costs be eliminated at the departmental levels.

Proposed Organization

1. The central services activities of the Purchasing Department and similar services in other departments be reorganized as a separate Central Services Department, substantially as indicated on Exhibit IV.

Central Data Processing Division

* 1. This and other separate tabulating installations in various departments, excepting the Police Department and Board of Education, be consolidated in a Central Data Processing Division in the Finance Department, to be administered by a Data Processing Manager reporting to the head of the Finance Department.

* Charter change may be necessary

2. A complete and detailed analysis be made of the work performed and the utilization of equipment to determine the equipment and staffing requirements for the Central Data Processing Division to insure maximum economical operations on a 2-shift basis.

* 3. A daily record and time card procedure be established for posting a complete record of the work performed by each employee as well as the machine time utilized, in order to establish the basis for determining the cost of each job.

* 4. The Data Processing Manager be personally responsible for developing a complete, detailed scheduling of all jobs on the basis of an analysis of all work required by departments, in order to maintain the highest possible machine usage factor and render the best possible service.

* 5. In connection with the above analysis and scheduling, the Manager be responsible for maintaining a current job assignment schedule for both the day and night shifts, administered by the respective supervisors.

* 6. The Data Processing Manager be required to conduct continuing surveys and analyses of all jobs performed on tabulating equipment, to determine their actual need and suitability for handling by tabulating methods. In cooperation with department heads, surveys be conducted to determine all clerical activities which can be performed more economically on data processing equipment.

* 7. If and when electronic data processing equipment is leased by the City, such equipment should be operated by the Central Data Processing Division.

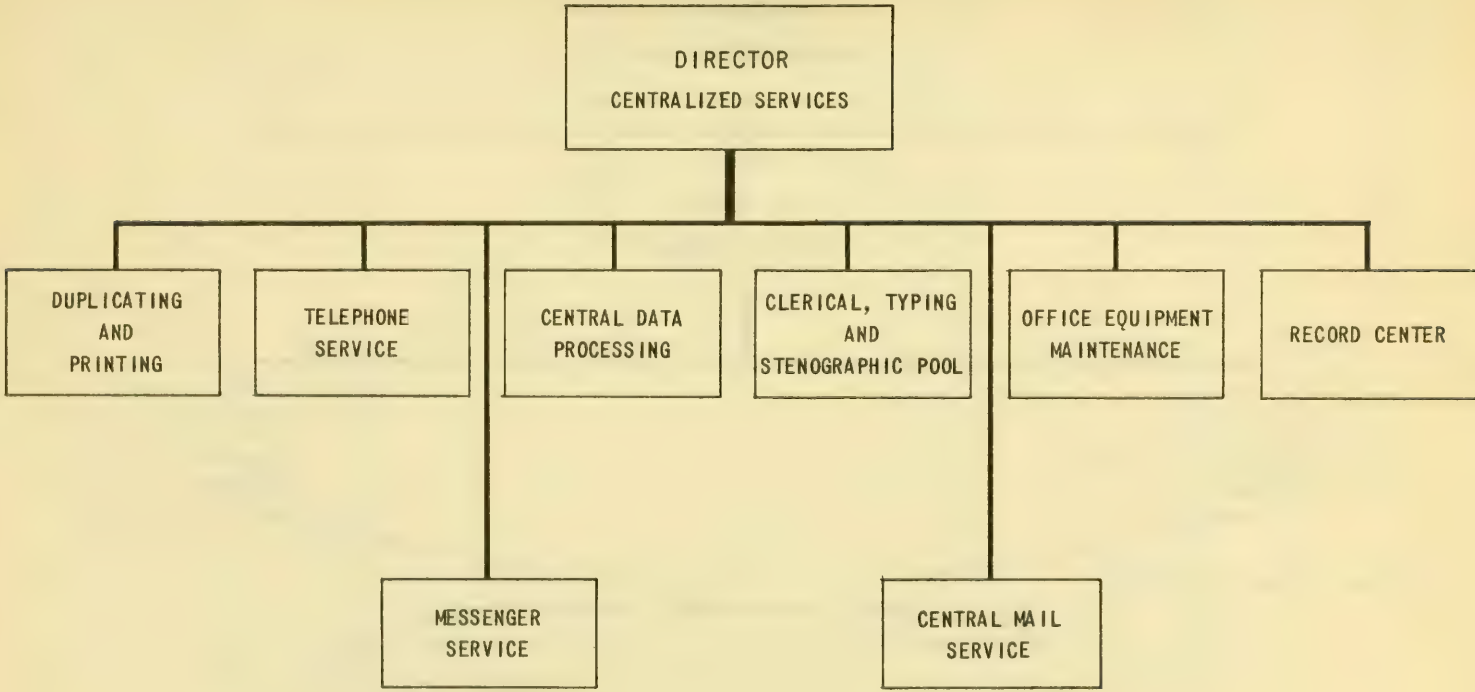
8. In view of the complex problems involved in properly planning for use of electronic data processing equipment to effect economies in clerical operations, a central committee be appointed to properly coordinate and expedite this program.

Proposed Organization

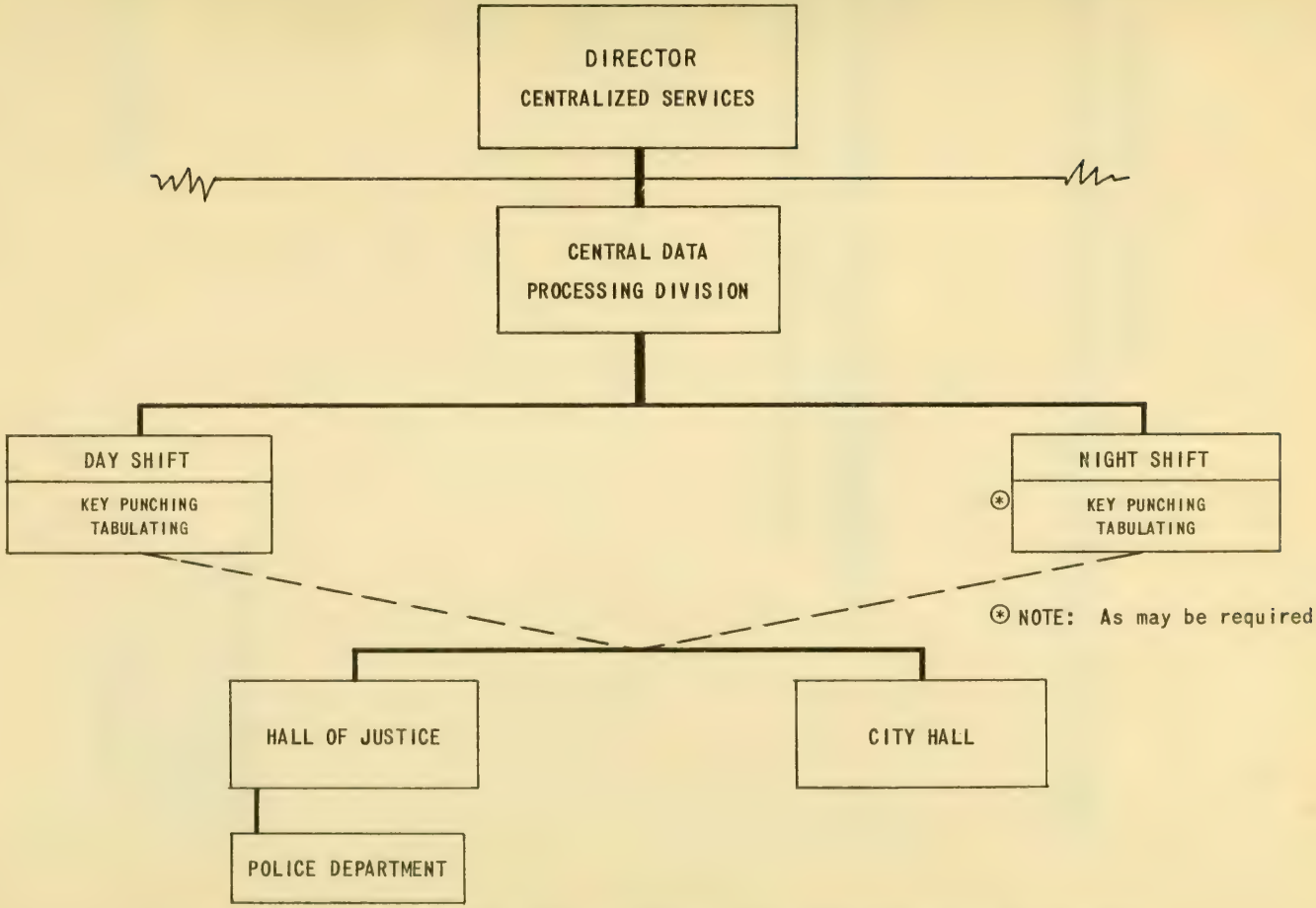
The mechanical tabulating activities now performed in the Purchasing Department and in a number of other departments, as previously mentioned, be consolidated and reorganized as a Central Data Processing Division of the Finance Department, as indicated on Exhibit V.

* Charter change may be necessary

PROPOSED ORGANIZATION
CENTRAL SERVICES DEPARTMENT



CENTRAL DATA PROCESSING DIVISION



NOTE: Does not include Clerical Staff; present Clerical personnel should be reviewed.

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A REPORT TO THE BLYTH-ZELLERBACH COMMITTEE

ON MODERN MANAGEMENT FOR SAN FRANCISCO

Boards and Commissions
A Plan of Organization
for San Francisco

JUNE 1961

VOLUME 5

BOARDS AND COMMISSIONS

A PLAN OF ORGANIZATION

FOR

SAN FRANCISCO

Reports of the
Task Forces

LETTER OF SUBMITTAL

May 1961

Marshall G. Mustain, Project Director
Mayor's Committee for Municipal Management
San Francisco, California

Dear Mr. Mustain:

The attached recommendations concerning the activities of Boards and Commissions are based on visits to meetings of various boards and commissions, analysis of their minutes, conversations with department heads and others affected by board and commission activities, and objective consideration of the basic reasons why boards and commissions should exist.

You will note that our recommendations are, for the most part, general rather than specific. Development in detail would involve additional study at such time as charter change language is drafted.

A. M. Chadbliss
Chairman

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Membership of Boards and Commissions	[illegible]

OPERATION OF BOARDS AND COMMISSIONS

There are 26 Boards and Commissions, and considerable differences exist as to the scope of their activities and the manner in which they operate. However, they all perform one or more of the following functions:

1. Executive

   (a) Selection of management
   (b) Review of administrative actions
   (c) Direct participation in administration

2. Quasi-legislative

   (a) Establishment of policy or formulation of recommendations on policy
   (b) Control of revenues and expenditures

3. Quasi-judicial

   (a) Hearing appeals from administrative decisions
   (b) Sitting as a court in disciplinary cases
   (c) Interpretation of legislation as applied to specific cases

RECOMMENDATIONS INVOLVING BOARDS CHANGE

1. EXECUTIVE FUNCTIONS

The exercise of executive functions by many commissions is the effect of significantly reducing the authority, responsibility and accountability of the department heads and the [illegible] to whom they report. Many commissions are [illegible] departments under them, thus [illegible] the departments [illegible] the [illegible] of the [illegible] ment.

Recommendation #1: All commissions should be divorced of their executive functions, so that department heads will report directly to the district top management, thereby strengthening the organizational structure and making for more effective management.

II. [illegible]

The activities of commissions in considering questions of public policy have the advantages of: (a) fostering greater public interest in and understanding of these questions, (b) bringing a variety of viewpoints to bear on such problems; and (c) ensuring greater consideration to many policy matters than would be feasible if policy formulation were limited to the Mayor and the Board of Supervisors. However, there is an [illegible] tendency of individual commissions to "promote" their own special areas of interest. Also, several commissions have areas of overlapping jurisdiction, resulting in occasional conflicts.

Recommendation #1: Some consolidation of commissions should be effected in order to:

(a) Provide for integrated development of basic policy in closely-related areas of operation.

(b) Reduce the number of areas of special interest.

(c) Establish budget priorities for related activities.

(d) Reduce the number of levels of appeal which now result in waste of time, effort and money.

Recommendation #2: In the area of policy-making, the commissions' activities should be aimed at developing sound policy recommendations which should be passed on to the Mayor and the Board of Supervisors.

III. QUASI-JUDICIAL FUNCTIONS

Commissions provide a very useful channel of appeal from administrative decisions, thus providing protection for both city employees and the public without the necessity of carrying all appeals to the Board of Supervisors or to the courts. The scope of appeals handled by each commission should correspond to the activities covered by that commission in the policy area.

Recommendation #3: Obtain the appeal function of commissions, subject to any changes in scope resulting from the consolidation recommended in the preceding section II.

With regard to the [illegible] of the [illegible] it is appropriate to point out that deficiencies have been noted in some of the rooms in which commission meetings are held. There is overcrowding, particularly at the meetings of the Art and Planning Commissions held at 100 Larkin Street, and seating for the public is often inadequate and poorly arranged. No facilities are available for properly displaying [illegible], plans, photographs, etc., so that both the commission members and the public can view them clearly.

Recommendation #2: Meeting rooms should provide adequate seating, with physical separation of seating areas between the commission and the public. Reflex projectors and screens should be provided so that exhibits can be better viewed by both the board and the public. The number of rooms so equipped should be [illegible] to the frequency of commission meetings and scheduling requirements.

IV. MEMBERSHIP OF BOARDS AND COMMISSIONS

The effectiveness of any board obviously depends to a large [illegible] on the manner in which its members are chosen. The following recommendations are aimed at avoiding potential sources of weakness:

Recommendation #1: Provide for staggered terms of office in order to insure continuity of policy and maintain a nucleus of experienced members of each board, and [illegible] the political [illegible] which can result from a "clean [illegible]" policy of a new Mayor.

Recommendation #2: Provide that commissions whose activities embrace specialized fields (economical, legal, artistic, etc.) [illegible] of their members [illegible] fields.

A PLAN OF ORGANIZATION

FOR

SAN FRANCISCO

IN THE

MAYOR'S COMMITTEE OF [illegible]

May 1961

Mr. Carl F. Wente, Chairman
Mayor's Committee for Municipal Management
San Francisco, California

Dear Mr. Wente:

We transmit herewith our plan for modernization of the governmental structure, developed in response to our finding, expressed in our Memorandum of Transmittal, that a complete overhaul was long past due. It was obvious early in our work that a resolution of the problems inherent in the basic plan of organization was a condition precedent to an effective and lasting solution to the problems in other areas.

This plan of organization was developed in accordance with sound management principles and without regard for political considerations. We recognize that differences of opinion can, do, and will exist but we feel the exact method used to accomplish the goal of modernization is not nearly as important as creating general public understanding of the need for such modernization.

In our opinion, this plan will serve that purpose, and therein lies its primary value. Therefore, we submit this proposal as being one way -- and admittedly there are other ways -- of achieving the goal of modernization. The responsibility for the plan is ours, and should not be considered to reflect the point, or points, of view held by members of the Advisory Committee.

Marshall O. Mugstein,
Project Director

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PLAN OF ORGANIZATION

FOR SAN FRANCISCO

Findings

Thirty years have elapsed since the last major revision of the government's plan of organization in San Francisco. The present charter was adopted in 1931. Population increase, technological advance, changes in the nature of the population and changing public attitudes toward local government have resulted in the need for major changes in the City-County management machinery.

San Francisco's population has increased from 634,000 in 1931 to 742,000 in 1961, an increase of 17%. The number of City-County employees has increased from 12,000 in 1931 to 21,000 in 1961, an increase of 75%. The annual budget has increased from $60,000,000 to $269,000,000, an increase of 350%. The City-County government has become an enterprise of major proportions.

The present 30 year old structure of City-County organization (Exhibit I) seriously impedes the job of management. It tends to create inefficiency and increased costs, instead of increased efficiency and decreased costs.

The principal aspects of this problem are as follows:

1. The office of Mayor is not only the chief executive officer of the city as per the charter, but is also by tradition, practice, and public desire the political leader of the community. The attention required to properly handle these functions is enormous, and beyond the capacity and time of a single individual. Thus the chief executive functions of managing the city government suffer. The committee believes the Mayor should be assisted in government's management functions and that these functions should be assigned a high level position directly responsible to the Mayor.

2. The office of Mayor has been weakened by diffusion of power and authority among twenty-six different boards and commissions. These boards and commissions, many of whose members are appointed by the Mayor, are empowered by the charter to exercise broad authority and influence over their respective government activities. Many of these boards and commissions in practice exercise administrative control, often amounts to frustrating the policy established by the Board of Supervisors and Mayor.

In some cases boards and commissions have become more closely identified with the clientele groups they are supposed to regulate than with the public interest they are supposed to protect.

The committee believes that the number of boards and commissions should be reduced and should be used primarily for advisory, ceremonial and quasi-judicial purposes. They should not operate as administrative bodies. Effective administration requires definite placement of responsibility and commensurate authority together with accountability for results. The boards and commissions tend to shield and obscure identification of incompetent management.

3. Department heads and boards and commissions are unable to communicate adequately with the Mayor. There are two principal reasons for this. There are too many line departments, staff agencies, boards and commissions, reporting directly to him, and his duties other than those of city management require an enormous amount of his time and attention. If the Mayor is to establish proper and efficient communications with the city's management heads, the present outdated cumbersome organization structure must be overhauled.

4. Departments, boards and commissions do not have adequate communication with each other. The proliferation of City-County agencies, each somewhat insulated from the others, results in problems of interdepartmental communications, and lack of overall coordination. This also has caused much unnecessary duplication of work.

The City-County government does not function as a cohesive integrated whole. This not only creates costly internal management problems but also creates confusion and ill will on the part of the employees and the public. Explanations based on internal organization problems are little comfort to the tax payer with his increasing tax bill.

5. The existing management structure and operating procedures contain no incentives for management to be efficient, responsible and economical.

Dedicated and serious effort is made by the least of Supervisors and the Mayor and others to hold down costs by budgetary control, and some economy has been accomplished. The present budget and procedures for its use however fall far short of providing a positive management tool for cost control. The budget based on items of expenditure, is so voluminous, and unwieldy, that it cannot possibly indicate where economies can intelligently be brought about. It provides no means to test the essentiality of all work being performed, or to challenge the need for items approved in previous budgets. (See section on budget elsewhere in this report.)

Its usefulness as a tool of management control is largely limited to controllable new items, which usually comprise less than 10 percent of the entire budget. Much annual cost increase is caused by present charter provisions, and added indebtedness over which the present Board of Supervisors and Department heads have no control.

6. There is a lack of overall planning, direction and coordination of personnel administration matters throughout the City-County government. It results in impaired employee morale and disruptive management developments. It causes inequities in treatment of both employees and constituents. It causes duplication of work and extra cost to the city. (See section on wages and salaries elsewhere in this report.)

The success of an enterprise depends upon the caliber, industry, and high enthusiasm of its personnel. Its continuity depends upon its ability to attract and generate these qualities on a continuing basis.

A government enterprise has an added characteristic of being conducted in a climate of politics. This imposes additional responsibilities of high integrity and fairness upon its personnel administration. This makes it increasingly important that personnel administration matters be competently planned, directed and coordinated.